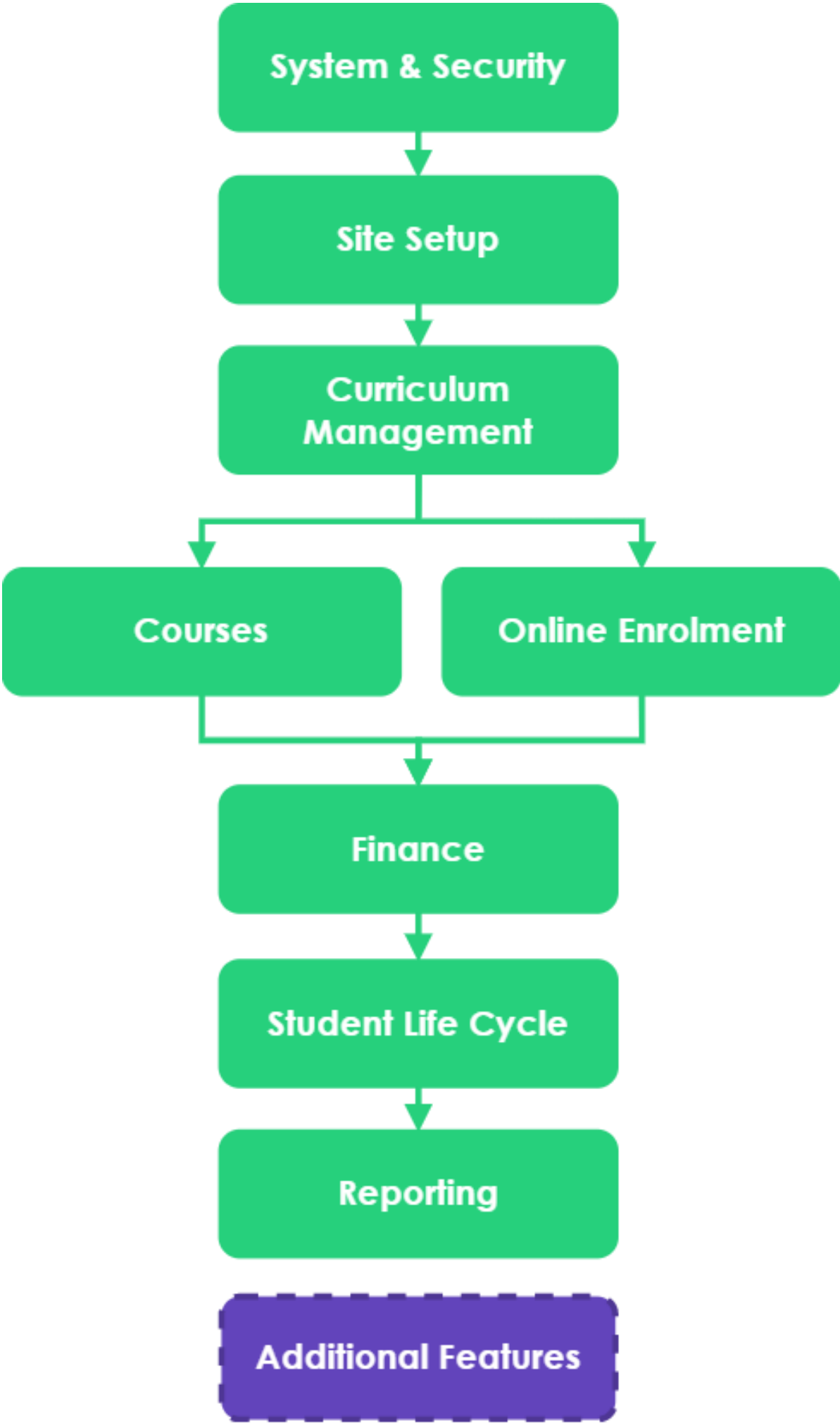


Topic 9.2 – Student Portal and Trainer View



Agenda



Topics Covered

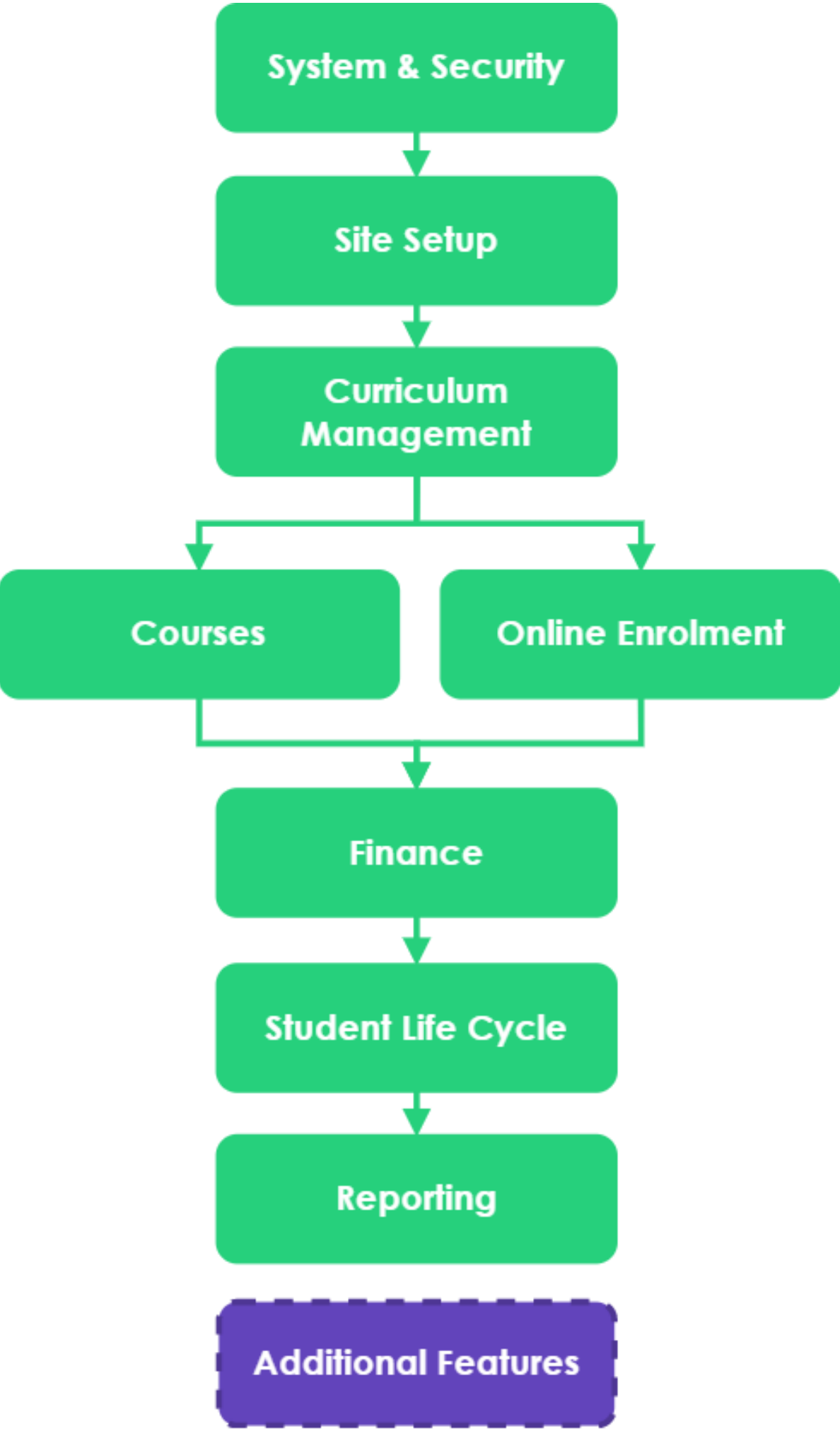
Student Portal

- 1 Portal System Preferences
- 2 Student Portal Access
- 3 Dashboard

Trainer View

- 4 Navigation
- 5 Trainer Portal Access
- 6 Recording Activity
- 7 Assessment Centre
- 8 Communication

Agenda



Learning Objectives

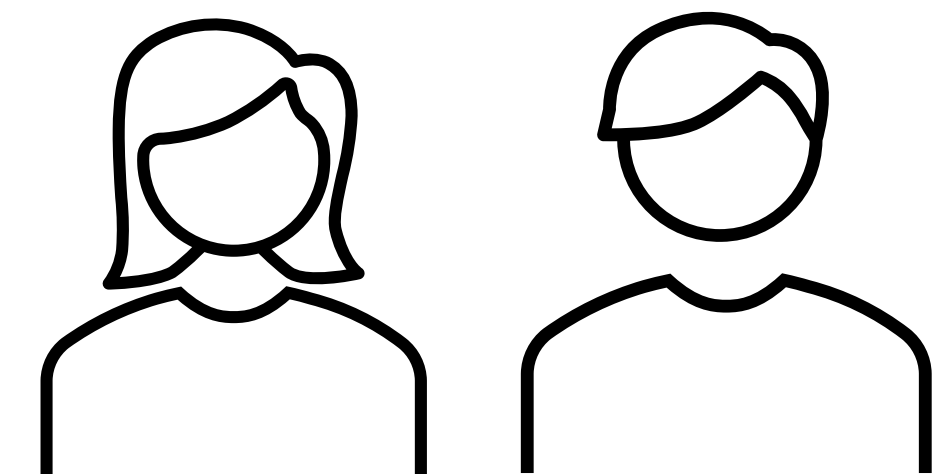
- 1 Understand how to update setting for the Student portal
- 2 Perform the change to the new dashboard for the student portal
- 3 Create a user (student) and login to the student portal
- 4 Understand how to navigate the Trainer portal
- 5 Create a user (trainer) access to the Trainer portal
- 6 Record activity within the Trainer portal
- 7 Understand how you can make uses of commutation tools within the Trainer portal

Please Note

Admin Required

Though this session focuses on the student and trainer, there are some settings that will require configuration by an administrator before use

Where applicable, banners indicate these administrator only items



Student Portal

Welcome Spencer Smith

Welcome Spencer! You have 0 unread documents, and 0 unread messages.



Courses

View and manage your courses, including progress and attendance



Finance

View your financials, including invoices & payments



Forms

Access all the forms required for your study.



Timetable

View your schedule and access all your upcoming events



Useful Links

Access to sites you may find useful



Services

View and manage the Services you have accessed, including things like extension requests



Assignments

Upload your assignments



Documents

Access documents made available for download



Employer

View your employment details



Applications

View and track your applications



Profile

Manage your profile



Attendance

View your attendance

Student Portal

Check if the Student Portal is Enabled

You can check to see if the student portal has been enabled on your site

Help > About > Self Service > Student

NOTE!

If your student portal is not enabled, please reach out to support or onboarding to enable

Admin Required

Self Service	
Agent:	Yes
Employer:	Yes
Student:	Yes



Portal System Preferences



Portal System Preferences

Access

Admin can control what is available to the student

The preferences of these settings are broken down into a few key sections

Administration > Configuration > Preferences > Self-Service Portals

Preferences

General

Self-Service Portals

Enrolment

Providers

Online Enrolment Portal

CertCheck

Payment Gateway

Communications

Integration

SAML

Forms

Self-Service Portals

Edit

StudentAgentCompanyTransport ProviderCertCheckGeneral

Assessment Centre

Allow assignment submissions:
Create notes:
Require acceptance of terms:

Dashboard

New Dashboard
Accommodation
Applications
Attendance
Courses
Documents
Finance
Homestay
Messages
Placement
Services

Activities
Assignments
Chat
CPD Tracker
Employer
Forms
Learning Support
Online Learning
Profile
Student Support

Portal System Preferences



Spencer Smith

Welcome Spencer Smith

Welcome Spencer! You have 0 unread documents, and 0 unread messages.



Courses

View and manage your courses, including progress and attendance



Finance

View your financials, including invoices & payments



Forms

Access all the forms required for your study.



Timetable

View your schedule and access all your upcoming events



Useful Links

Access to sites you may find useful



Services

View and manage the Services you have accessed, including things like extension requests



Assignments

Upload your assignments



Documents

Access documents made available for download



Employer

View your employment details



Applications

View and track your applications



Profile

Manage your profile



Attendance

View your attendance

Preferences

General

Self-Service Portals

Enrolment

Providers

Online Enrolment Portal

CertCheck

Payment Gateway

Communications

Integration

SAML

Forms

Self-Service Portals

Edit

Student

Agent

Company

Transport Provider

CertCheck

General

Assessment Centre

Allow assignment submissions:



Create notes:



Require acceptance of terms:



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

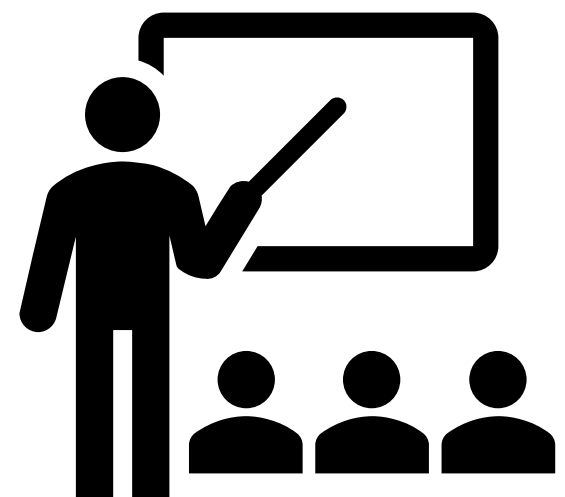


Useful Links



Portal System Preferences

- **Assessment Centre**
This allows students to submit their assignments within the portal
- **Dashboard**
Lets you enable or disable specific elements of the Student Portal
- **Display**
Lets you alter elements within the pages
- **Extensions**
If you make use of Services, you can allow students to make extension requests for specific service types here
- **Finance**
This controls making payments through the Student Portal
- **Permission**
These settings can allow or disallow students from doing certain things in the Student Portal
- **Preferences**
Controls Logins, T&C and some customer messages for the portal
- **Miscellaneous**
Single sign on, T&C Theme options and welcome messages





Student Portal Access



ReadyTech Education

Student Portal Access

As a Student

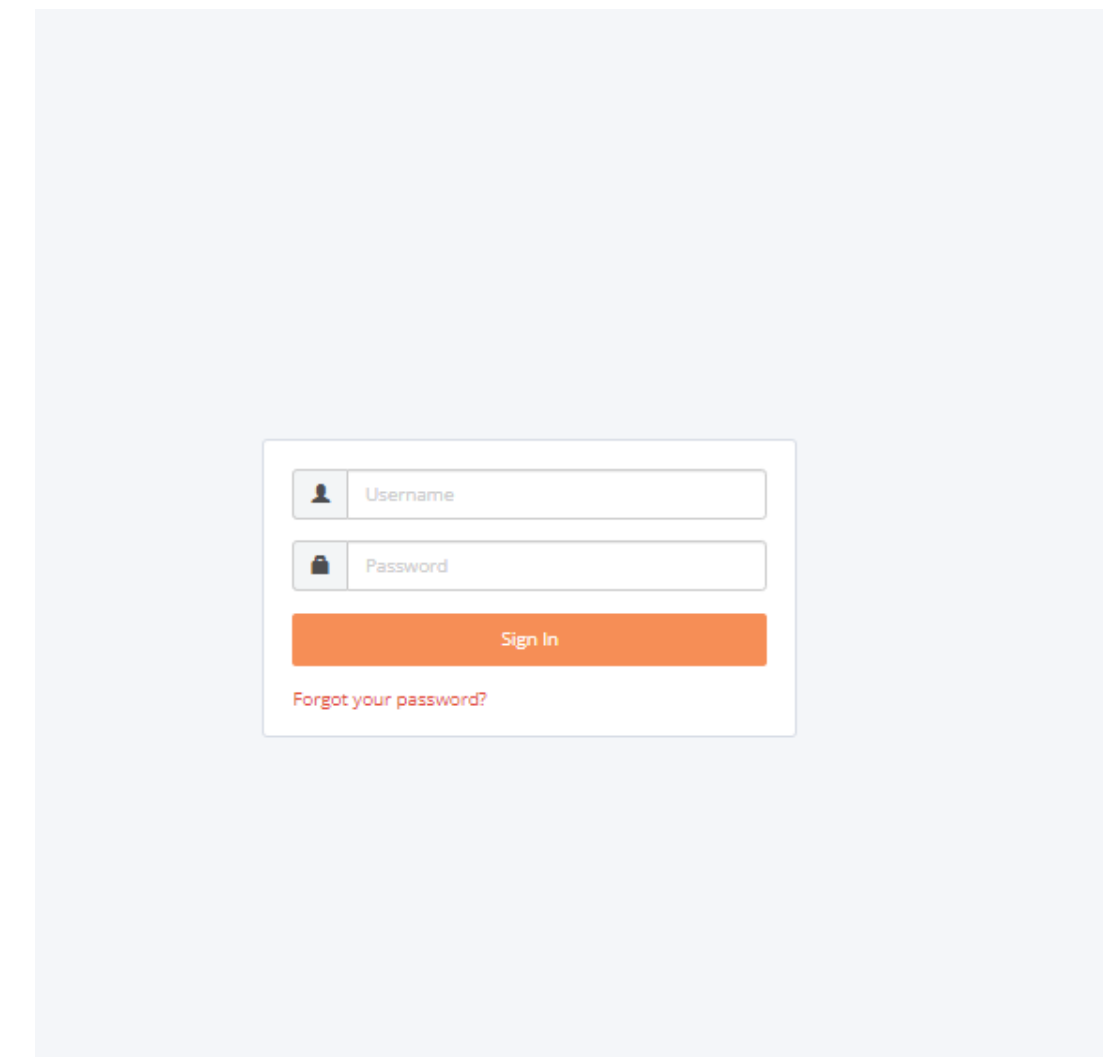
Use your standard system URL

Students use their own login username and password

Students are re-directed to the student portal

<https://yoursite.jobreadyplus.com/>

<https://yoursite.vettrakcloud.com.au/>



Student Portal Access

New Student

An email template is used to give new students access on account creation

Communications > Templates > Course Applications > Letters and Forms > Templates

Include the merge field

`{{party[student_portal_activation_link]}}`

Which will send a student portal activation link

Content

Dear {party[other_name]},

Welcome to {system[name]} and congratulations on your enrolment into {course[name]}.

Your training will be conducted by {course[coordinator_name]}, commencing {course[date_enrolment_start]} and due to complete on {course[date_enrolment_end]}.

Please fill in your details here: [https://onboarding.readystudent.com.au/survey/69234?party_identifier={party\[party_identifier\]}](https://onboarding.readystudent.com.au/survey/69234?party_identifier={party[party_identifier]})

{system[site_name]} also offers a student portal where you can view your course details, unit activity, upcoming events and also send and receive documents.

If you haven't already, you can activate and access your student portal via the following link: {party[student_portal_activation_link]}

If you have any questions regarding your training, please feel free to contact us on {system[primary_phone]} or email us at {system[primary_email]}.

We look forward to seeing you on {course[date_enrolment_start]}.

Party

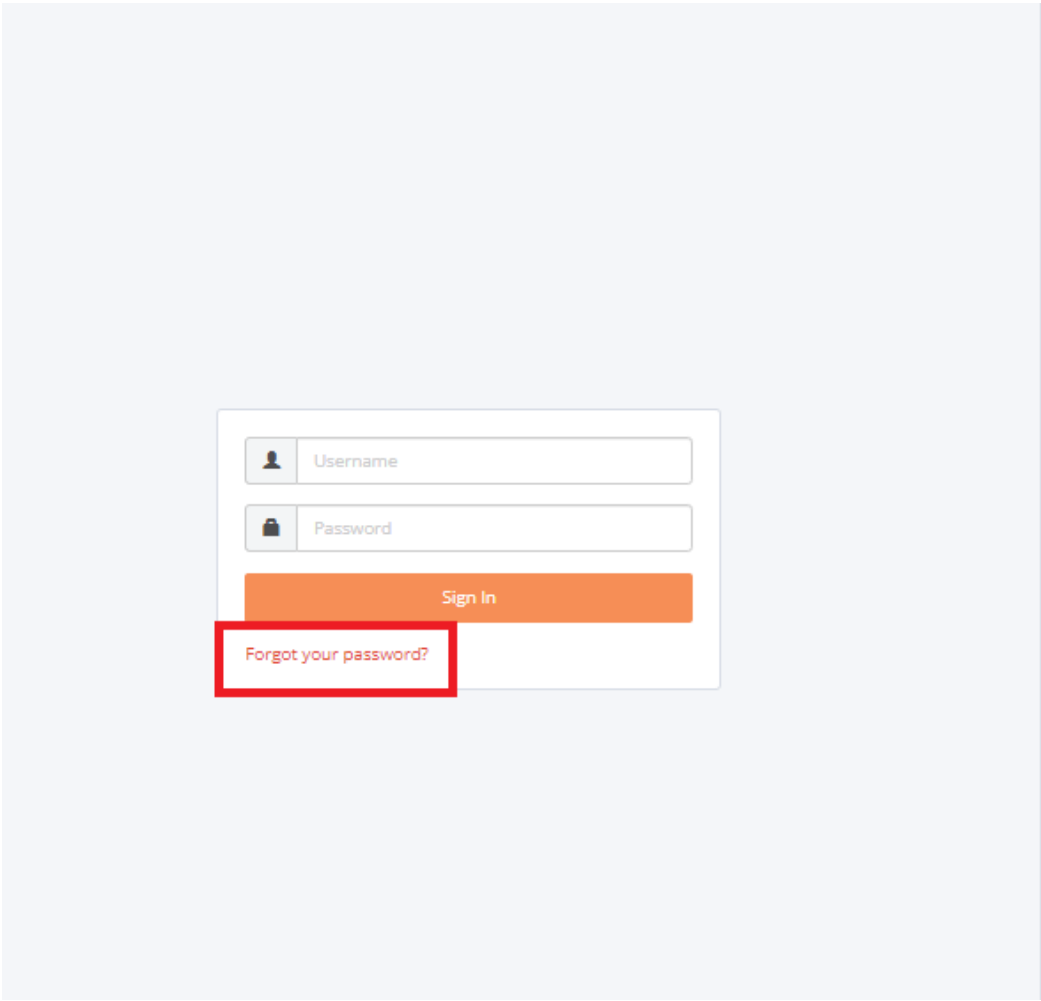
- abn
- address_list
- anzsic_description
- contact_email
- contact_firstname
- contact_method
- contact_name
- contact_phone
- contact_surname
- contact_title
- date_birth
- drivers_licence
- email_addresses
- fax

Student Portal Access

Password Reset

Self Service

Password re-set feature available on the login screen



Hi Tom,

You have requested that your password be reset.

To reset your password, please click on the link below and follow the on-screen instructions:

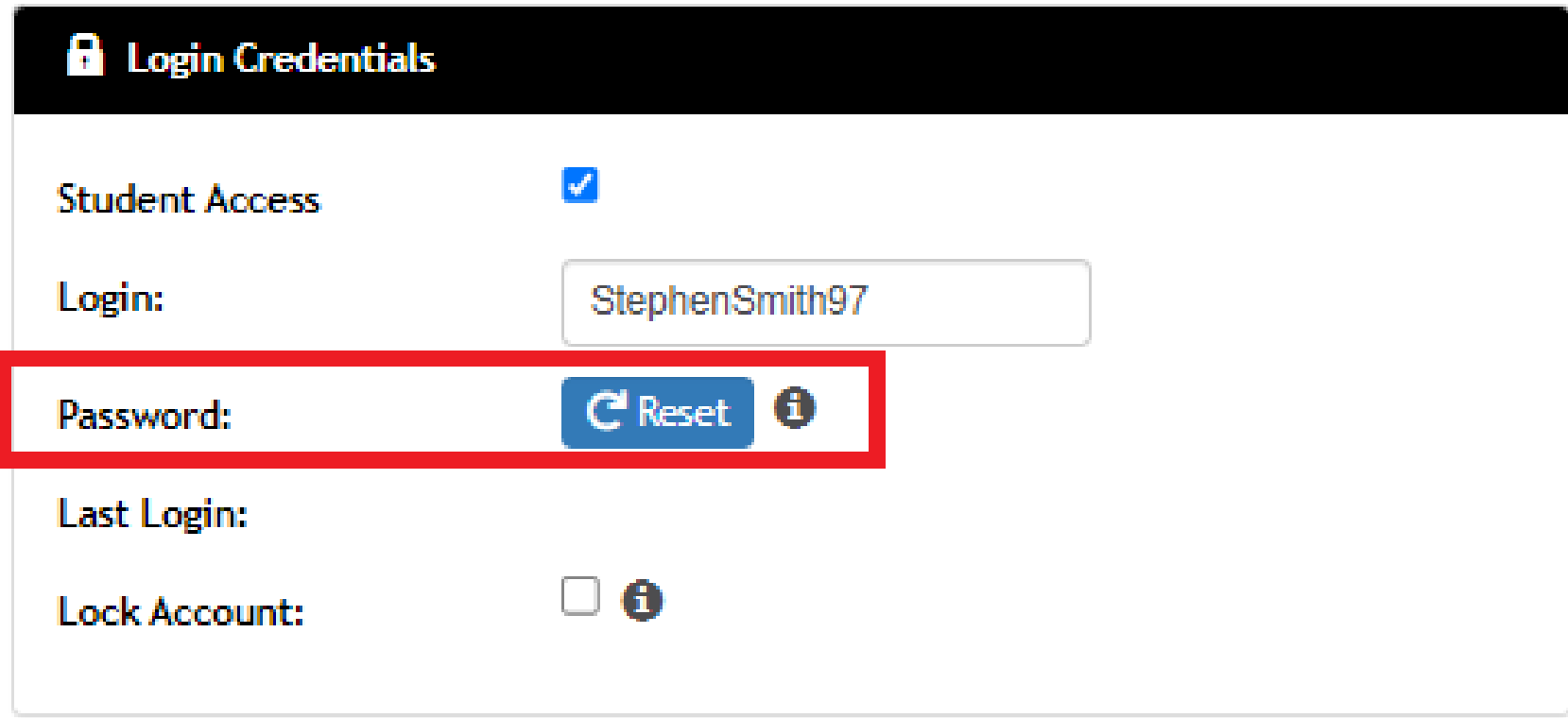
https://onboarding.jobreadyplus.com/party/password_reset/eNXruKizKp7qSkZrMdepwcnxV76Ng9XjJvI4bJjZ

This link will be valid for 2 hours. If you did not send this request, please notify your education provider's system administrator.

Admin

Community > List All > select student > Details > Login Credentials

An admin can reset the password of a student by sending through an automatically generated email



Lets go do it!

Let's take a look at:

- Enabling the new dashboard
- Providing students access to the student portal





Dashboard

Dashboard

Finance

Displays students outstanding invoices

Payments can be both made (if enabled and setup) and viewed

readytech

Spencer Smith

Invoice List

Search:

Search

Search Results

1 - 4 of 4

1 Page

Invoice Date	Number	Type	Party	Course/Group	Description	Status	Invoiced	Paid	Deferred	Outstanding	
8/2/2023	INVREA00001	Invoice	Smith, Spencer			Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	
8/2/2023	INVREA00002	Invoice	Smith, Spencer	Spencer Smith		Active	\$1,350.00	\$1,350.00	\$0.00	\$0.00	
20/2/2023	INVREA00005	Invoice	Smith, Spencer			Active	\$1,680.00	\$1,680.00	\$0.00	\$0.00	
10/3/2023	INVREA00017	Invoice	Smith, Spencer	Provide First Aid (First Aid April) / ENREA00126		Active	\$1,250.00	\$0.00	\$0.00	\$1,250.00	

1 - 4 of 4

1 Page

readytech

Spencer Smith

Payment List

Search:

Search

Search Results

1 - 5 of 5

1 Page

ID	Date	Invoice	Type	Amount	Enabled	
PMT00001	8/2/2023	INVREA00001	Payment	\$1350.00	<input checked="" type="checkbox"/>	
PMT00004	15/2/2023	INVREA00002	Payment	\$1350.00	<input checked="" type="checkbox"/>	
PMT00015	10/3/2023	INVREA00017	Refund	\$-50.00	<input checked="" type="checkbox"/>	
PMT00013	10/3/2023	INVREA00005	Payment	\$1680.00	<input checked="" type="checkbox"/>	
PMT00014	10/3/2023	INVREA00017	Payment	\$1250.00	<input checked="" type="checkbox"/>	

1 - 5 of 5


1 Page

Dashboard

Forms

Enabled feedback forms can be viewed within the portal

Clicking on a form will allow students to fill it out and submit it for review by staff



Forms

Access all the forms required for your study.

Form Details

Edit

Copy

Details

Name:

AVETMISS Details

Category:

Enrolment

Web form:

Branding:

Assignee:

URL:

https://onboarding.readystudent.com.au/survey/69234?party_identifier={Party Identifier}

Settings

Enabled:

☒

Link:

☐ Services

Add to all Host Families:

☐

Make available for all employers:

☐

Allow Party Entity Data Import:

☒

Make available for all individuals:

☒

Allow Saving:


☒

Publish to Student Portal:

☒ Form ☐ Submitted Form

Save Expires After:

Never



Forms

This page contains all the required forms.

Enrolment

- Additional Document Upload
- AVETMISS Details

Feedback

- Placement Feedback Survey

AVETMISS Details

Please complete your details below

1

2

3

Personal Information

Date of Birth

22/9/1997

Gender

Female

Male

Non-binary

E-mail Address

gemma.cameron+SpencerSmith@readytech.io

Mobile Number

Unit/Flat Number

Street/Lot Number

9

Street Name

Dashboard

Courses

Displays all Courses a student is enrolled in

Clicking on the course name will bring up the enrolment details

readytech

Spencer Smith

Enrolment List

1 - 3 of 3

1 Page

Course	Code	Study Mode	Start Date	Target End Date	End Date	Status	Enabled
Advanced Diploma of Building Design (2023 AdDip Building Design)	CPP60421	Full Time	16/2/2023	14/2/2024		Active	<input checked="" type="checkbox"/>
Diploma of Accounting (2023 Diploma of Accounting)	FNS50222	Full Time	7/2/2023	15/2/2023	15/2/2023	Completed	<input checked="" type="checkbox"/>
Provide First Aid (First Aid April)	HLTAID011	Full Time	1/4/2023	28/4/2023		Active	<input checked="" type="checkbox"/>

1 - 3 of 3

1 Page

3

Courses

View and manage your courses, including progress and attendance

readytech

Spencer Smith

Advanced Diploma of Building Design (2023 AdDip Building Design)

CSEREA00024

Enrolment Details

Course:

CSEREA00024 / 2023 AdDip Building Design

Start Date:

16/2/2023

Program:

CPP60421 / Advanced Diploma of Building Design

Target End Date:

14/2/2024

Enrolment Status:

Active

End Date:

Details

Progress

Events/Attendance

Finance

Course Details

Course: Advanced Diploma of Building Design (2023 AdDip Building Design)

Academic:

Enrolment Status: Active

Other Academic:

Study Mode: Full Time

Coordinator:

Course Dates

Start Date: 16/2/2023

Actual End Date:


Target End Date: 14/2/2024

Dashboard

Timetable


Any events that the student is set to attend will be displayed on this page


Students can view the details for the events assigned to them



Timetable

View your schedule and access all your upcoming events



 Spencer Smith

Timetable

16 April 2023 — 22 April 2023

Go to date: 17/4/2023

« Previous

Today

Next »

Day

Week

Month

All

Subscribe to your calendar

	Sun 16/04	Mon 17/04	Tue 18/04	Wed 19/04	Thu 20/04	Fri 21/04	Sat 22/04
Before 8:00am							
8:00am							
9:00am							
10:00am							
11:00am							
12:00pm							
1:00pm		Advanced Diploma of Building Design (2023 AdDip Building Design)				Advanced Diploma of Building Design (2023 AdDip Building Design)	
2:00pm							
3:00pm							
4:00pm							
5:00pm							
After 6:00pm							

1:00pm - 5:33pm - Mon 17/04

Advanced Diploma of Building Design (2023 AdDip Building Design)

Type: Class

Series: Afternoon

Timetable

16 April 2023 — 22 April 2023

Go to date: 17/4/2023

Event Details

✓ You are enrolled onto this event.

Event Owned By: Advanced Diploma of Building Design (2023 AdDip Building Design)

Title: Advanced Diploma of Building Design (2023 AdDip Building Design)

Series: Afternoon

Type: Class

When: 17/4/2023 1:00 PM to 5:33 PM

Subscribe to your calendar

Dashboard

Documents

If documents have been made available for the student, they will be available to view and download

readytech

Spencer Smith

Dashboard

General

Chat

Timetable

Documents 5 new

My Documents 5 new

Add a new Document

Forms

Finance

Applications

Documents

Search

Enter document name...

Search Clear

Other 5

Personal		Code	Number of Documents	
Smith, Spencer		00020006	5	
#	Document	Type	Category	Last Updated
131	Invoice :INVREA00018	Other	Invoice	10 March 2023 1:08 PM
130	Payment on :INVREA00017	Other	Payment	10 March 2023 1:06 PM
129	Payment on :INVREA00017	Other	Payment	10 March 2023 1:02 PM
96	Application Incomplete - Identification Documents	Other	Applications	7 March 2023 11:14 AM
68	Application Received	Other	Applications	21 February 2023 9:50 AM

5

Documents

Access documents made available for download

Person

Profile

Compliance

Career/Employment

Enrolments 2 / 1

Certificates 1

Finance

Balance: \$0.00

Schedule

Notes / Checklists 2 +

Email

SMS

Documents 19

Letters & Forms

Feedback Forms

Applications

Groups 0

Admin

Party > Smith, Spencer > Document Edit

save Cancel

Document

Name: Invoice :INVREA00018

Description:

A B I U Paragraph System Font 10pt

or URL:

New File: Choose file No file chosen

Category: Invoice

Folder: Use same as category

Type:

Order:

Portal: ☒

Private:

Web Published:

Full URL: https://onboarding.vetrakcloud.com.au/documents/1005/13/105a_invoice_INVREA00018_1678414135.pdf

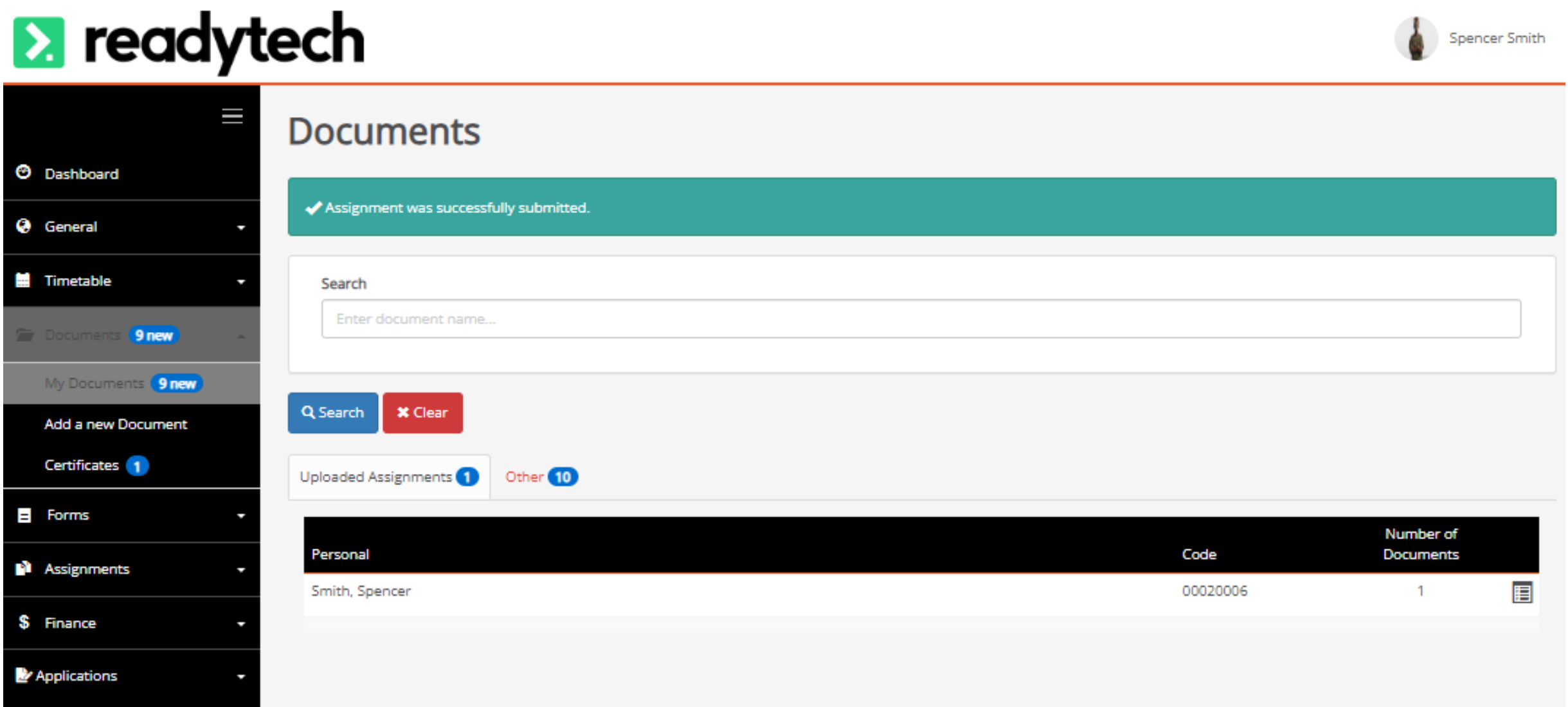
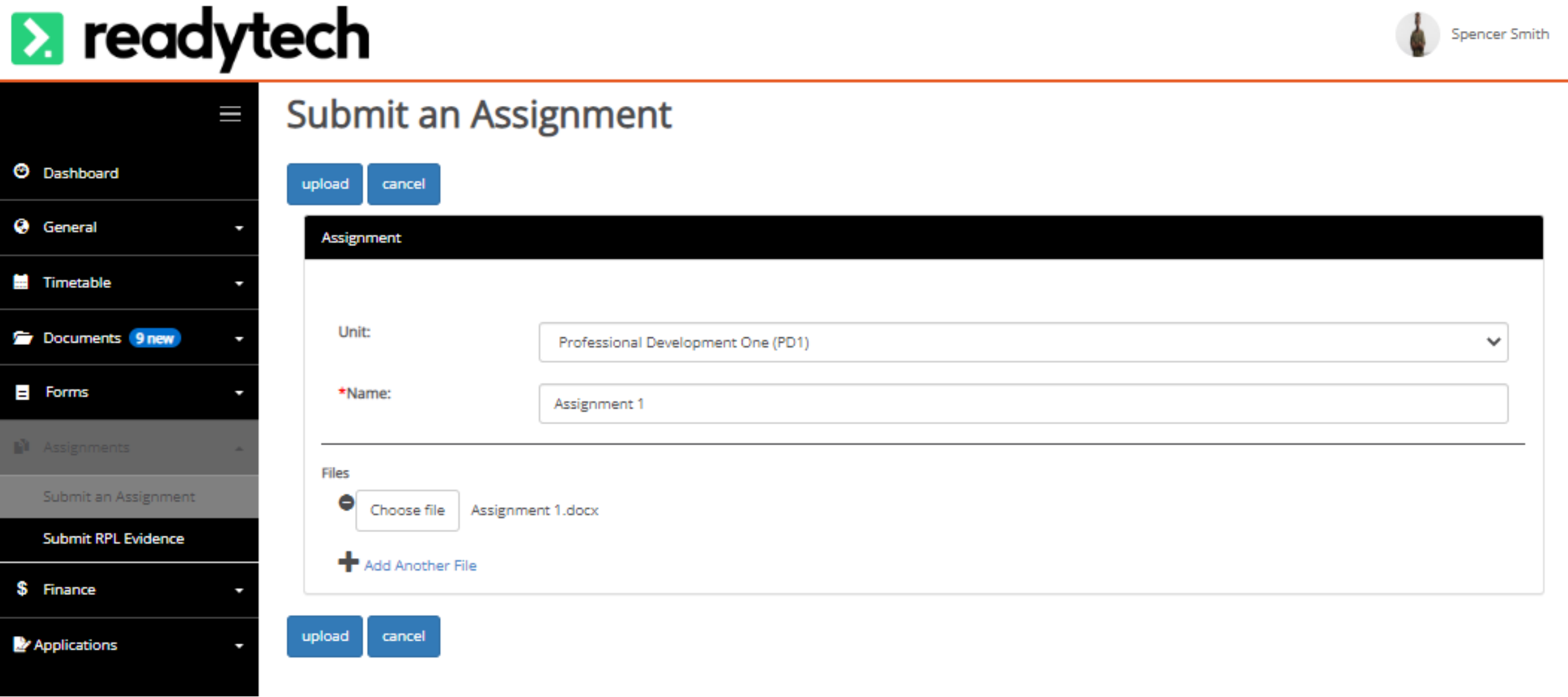
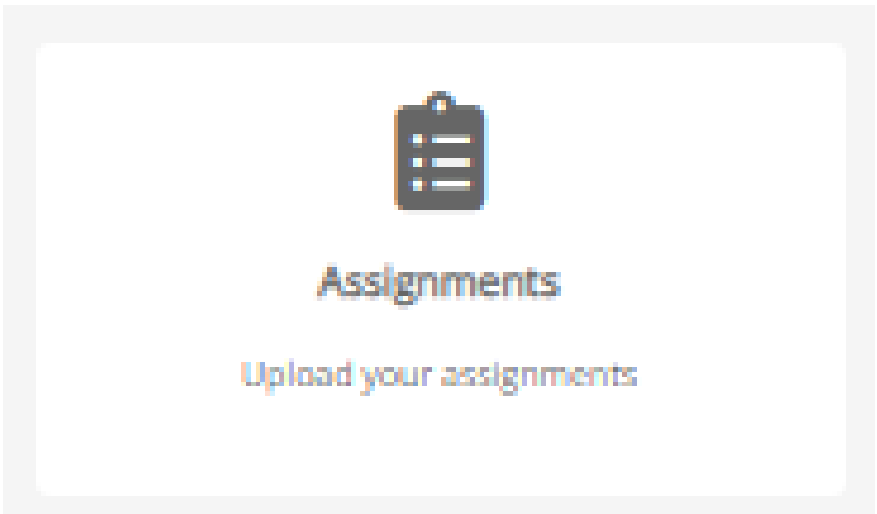
Current file: 105a_invoice_INVREA00018_1678414135.pdf

Dashboard

Assignments

Students can upload a file that can be sent to a trainer to review

An automated email can be sent upon assignment submission



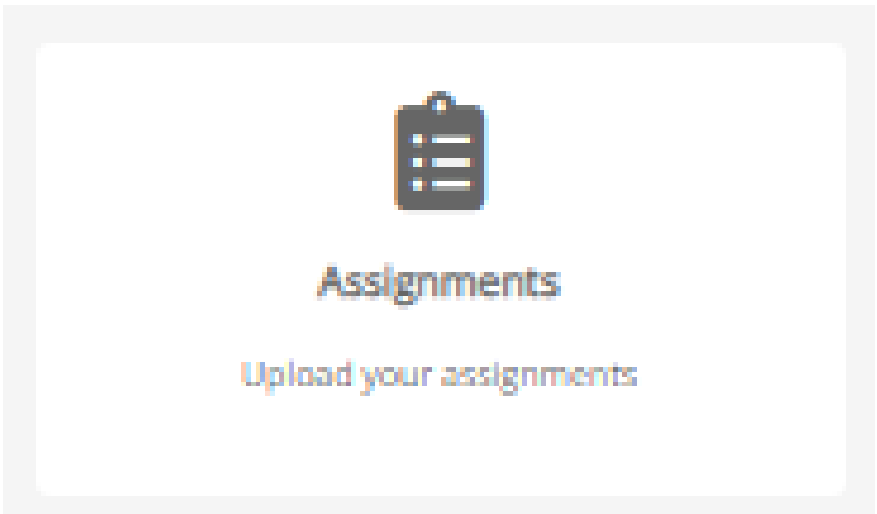
Dashboard

Assignments

Students can view marks and comments made by the Trainer

Automated emails can be sent to student when these are available

Marks and feedback viewed in [Course > Select Course > Progress > Unit](#)



readytech

Spencer Smith

Dashboard

General

Courses 10

Activity/Leisure

Services 2

Extension Requests

Employer

Useful Links

Timetable

Documents 15 new

Forms

Assignments

Finance

Professional Development One (CSEREA00026) CSEREA00026

Enrolment Details

Course: CSEREA00026 /

Start Date: 1/5/2023

Program: PD1 / Professional Development One

Target End Date: 30/6/2023

Enrolment Status: Completed

End Date: 5/4/2023

Details

Progress

Events/Attendance

Finance

Units

Core/Elective

Code	Unit	Outcome	Start Date	Target End Date	End Date	Last Assessed
CORE UNITS						
PD1	Professional Development One (PD1)	Competent	5/4/2023		5/4/2023	5/4/2023
Good job						
STREAM UNITS						

readytech

ReadyTech Education

450

Dashboard

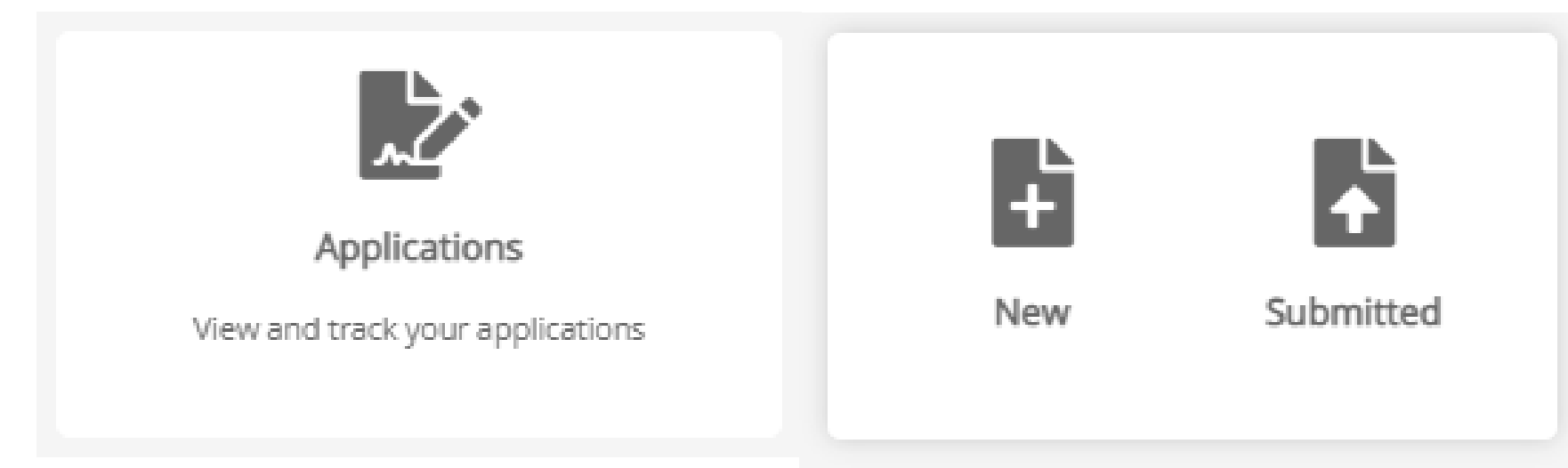
Applications

Students can:

1. Complete a new application from
2. View existing course application and its status

Only relevant to people using course forms and application view

You can prevent students viewing course form applications within the settings for the Course Form


A screenshot of the 'Edit Form' settings page. At the top, there are 'Save' and 'Cancel' buttons. Below this is a 'Details' section with fields for 'Name' (set to 'Full Application Form'), 'Location' (a dropdown), and 'Branding' (set to 'RT'). The 'Settings' section contains several options: 'Enabled' (checked), 'Login' (set to 'Optional'), 'Disable Party Data Update' (unchecked), 'Auto Confirm Enrolments' (unchecked), 'Auto Confirm Services' (unchecked), and 'Hide from Student Portal' (unchecked, which is highlighted with a red box). A 'Finance' section is partially visible at the bottom.

Dashboard

Applications


Students can:

- 1. Complete a new application form
- 2. View existing course application and its status




Applications

View and track your applications



New



Submitted

readytech

Spencer Smith

Dashboard

General

Chat

Timetable

Documents 5 new

Forms

Finance

Applications

Submitted 3

New

New Application

Course

Service

Search:

Search

1 - 16 of 16

1 Page

Course	Code	Start Date	End Date	
Advanced Diploma of Building Design (2023 AdDip Building Design)	CPP60421	24/1/2023	18/6/2024	Apply
Advanced Diploma of Building Design (2023 AdDip Building Design)	CPP60421	24/1/2023	18/6/2024	Apply
Advanced Diploma of Building Design (2023 AdDip Building Design)	CPP60421	16/2/2023	14/2/2024	Apply
Certificate I in Agriculture [[smart fee]] (Ag April Itake)	AHC10222	10/3/2023	13/3/2024	Apply
Certificate II in Government (Feb2022)	PSP20122	17/2/2023	11/6/2024	Apply
Certificate III in Bread Baking (S1 CIII Bread Baking)	FBP30421	1/12/2022	1/12/2023	Apply
Certificate III in Business (2023 Cert III Business)	BSB30120	16/1/2023	16/1/2024	Apply

readytech

Spencer Smith

Dashboard

General

Chat

Timetable

Documents 5 new

Forms

Finance

Applications

Submitted 3

New

Submitted Applications

Course

Service

Check the status of your applications. If you want to submit a new application, click here

Submit New Application

1 - 3 of 3

1 Page

Course	Code	Created On	Last Update	Status
Diploma of Accounting (2023 Diploma of Accounting)	FNS50222	7 February 2023 2:54 PM	7 February 2023 2:59 PM	Enrolled
Advanced Diploma of Building Design (2023 AdDip Building Design)	CPP60421	16 February 2023 1:35 PM	14 March 2023 9:43 AM	Interview
Provide First Aid (First Aid April)	HLTAID011	3 March 2023 3:28 PM	6 March 2023 1:43 PM	Enrolled

1 - 3 of 3

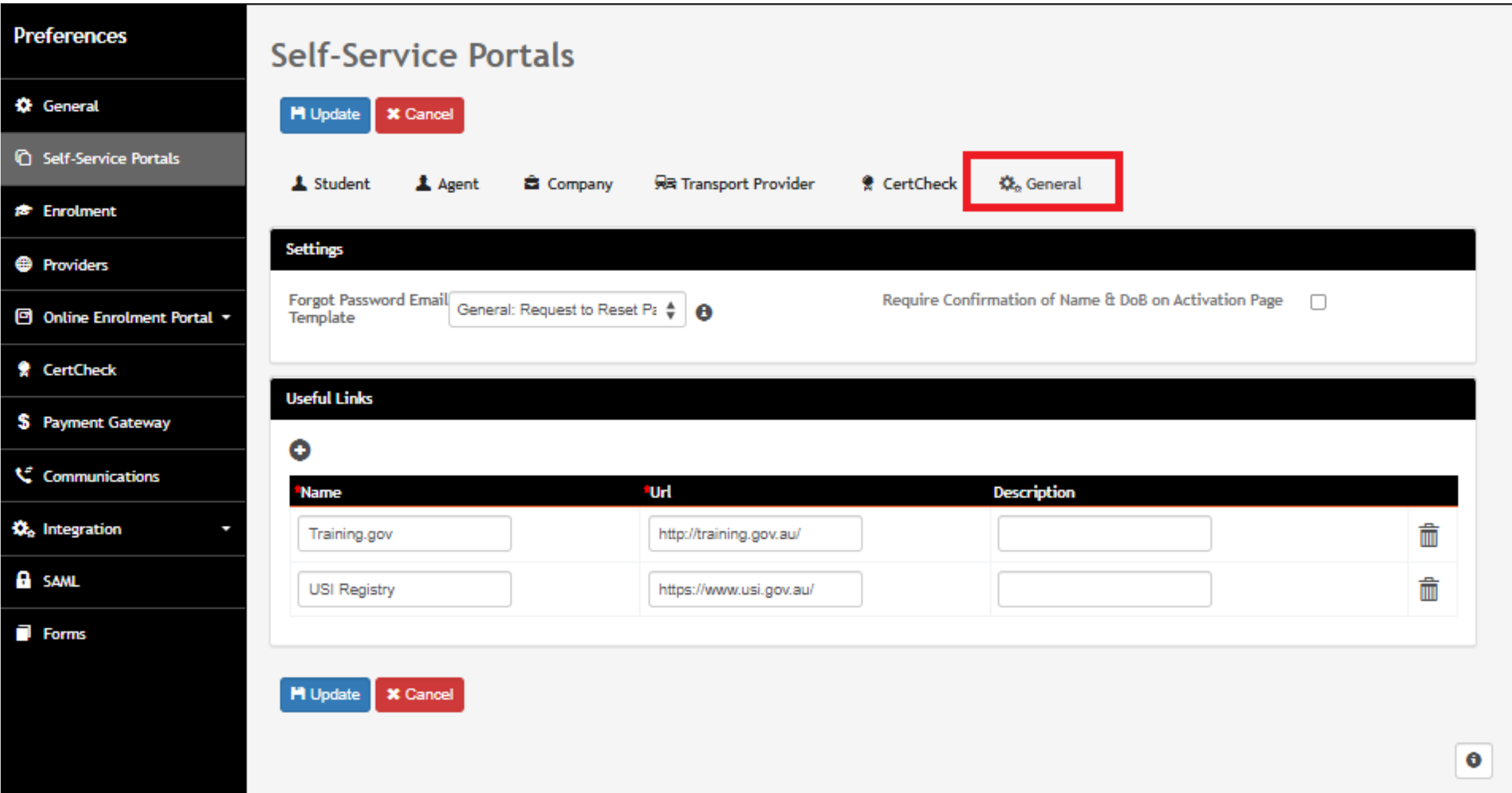
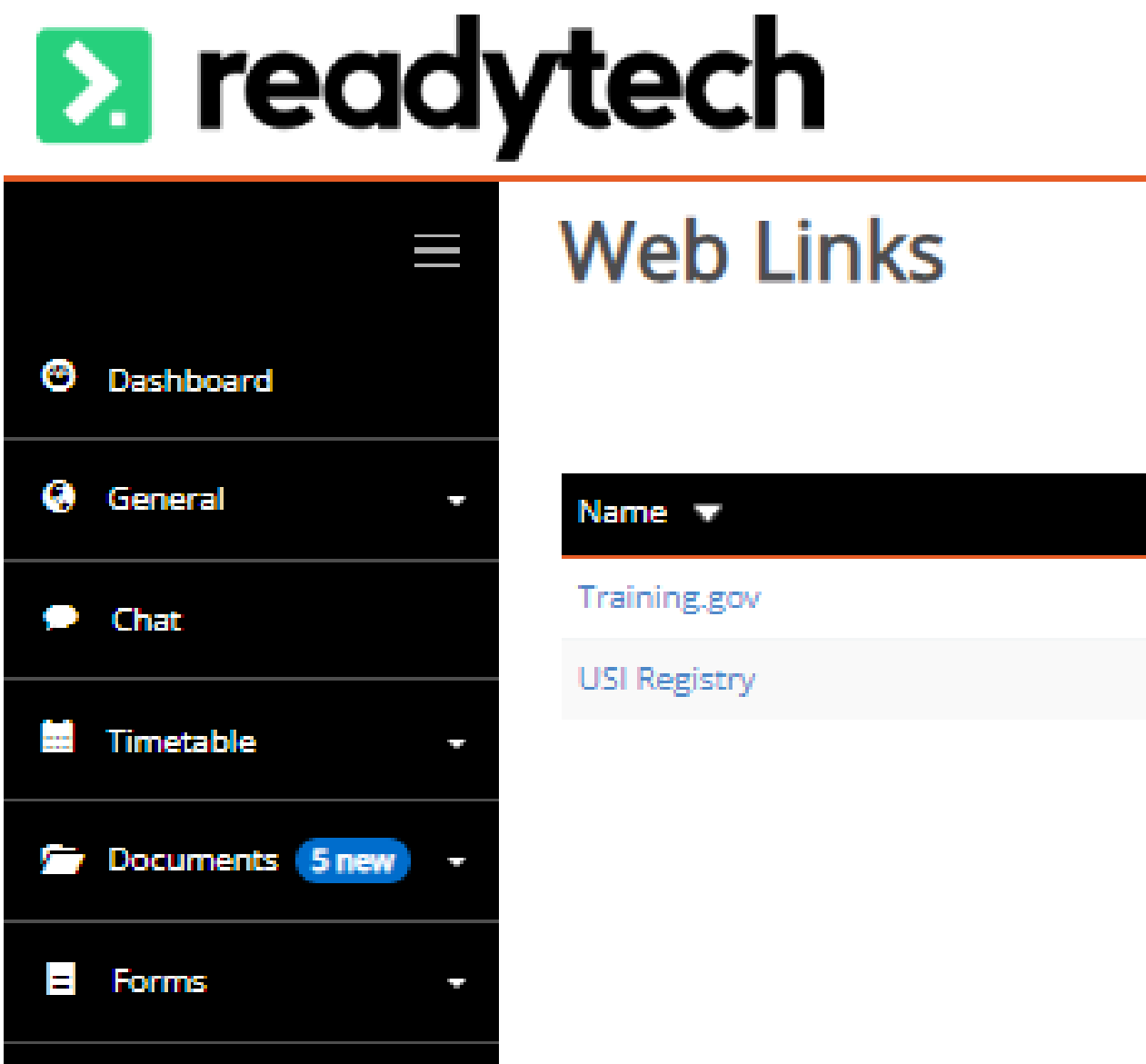
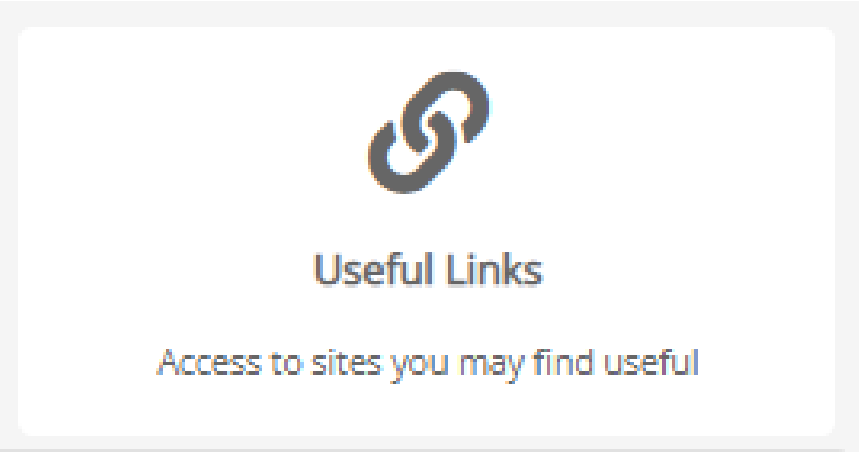
1 Page

Dashboard

Useful Links

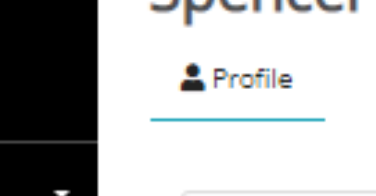

Link websites to display (added within the admin view)

Administration > Configuration > Preferences > Self Service Portals > General



Profile

NOTE: Allowing a student to edit this page can result in critical AVETMISS details being changed



Spencer Smith

Dashboard

General

Chat

Timetable

Documents 5 new

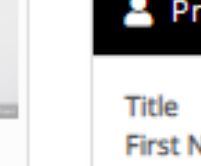
Forms


Finance

Applications

Profile

Contacts



Australia 

22

September 1997 (25)

Profile

Title	Dr	ID	00020006
First Name(s)	Spencer	USI	None issued
Middle Name	Josh	Known By	JJ
Surname	Smith	Gender	Male

Address

(Home)

9 ELIZABETH STREET
MELTON SOUTH Victoria 3338
Australia

Phone

(Phone) (Home):

0455968635

Email

(Personal)

gemma.cameron+SpencerSmith@readytech.io

USI

AVETMISS - The Unique Student Identifier has not been recorded

Dashboard

Attendance

Shows all the enrolments and the attendance rate for each of them

readytech

Spencer Smith

Attendance

1 - 3 of 3

1 Page

Course	Code	Start Date	End Date	Actual (At today's date)	Actual (Total Enrolment)	Projected (At best rate)	
Diploma of Accounting (2023 Diploma of Accounting)	CSEREA00018	7/2/2023	15/2/2023	88.24	50.00	50.00	
Advanced Diploma of Building Design (2023 AdDip Building Design)	CSEREA00024	16/2/2023		0.00	0.00	100.00	
Provide First Aid (First Aid April)	CSEREA00028	1/4/2023		0.00	0.00	100.00	

1 - 3 of 3

1 Page

readytech

Spencer Smith

Attendance

Summary: Diploma of Accounting (2023 Diploma of Accounting) / ENREA00055

Total Events

7

Total Attended Events

4

Total Hours

15.0

Total Attended Hours

7.5

Actual (At today's date)

88.24%

Actual (Total Enrolment)

50.0%

Projected (At best rate)

50.0%

1 - 7 of 7

1 Page

Date	Event	Series	Attended	Time/Hours	Absent Reason	Notes
7/2/2023	Diploma of Accounting (2023 Diploma of Accounting) 9:00 AM to 11:00 AM	Option 1 - Morning Class	✓	02:00	n/a	
8/2/2023	Diploma of Accounting (2023 Diploma of Accounting) 12:00 PM to 2:30 PM	Compulsory Class	✓	02:30	n/a	
9/2/2023	Diploma of Accounting (2023 Diploma of Accounting) 9:00 AM to 11:00 AM	Option 1 - Morning Class	✓	02:00	n/a	
10/2/2023	Diploma of Accounting (2023 Diploma of Accounting) 12:00 PM to 2:30 PM	Compulsory Class		n/a	n/a	
11/2/2023	Diploma of Accounting (2023 Diploma of Accounting) 9:00 AM to 11:00 AM	Option 1 - Morning Class		n/a	n/a	
13/2/2023	Diploma of Accounting (2023 Diploma of Accounting) 9:00 AM to 11:00 AM	Option 1 - Morning Class	✓	01:00	n/a	
15/2/2023	Diploma of Accounting (2023 Diploma of Accounting) 9:00 AM to 11:00 AM	Option 1 - Morning Class		n/a	n/a	

1 - 7 of 7

1 Page

Dashboard

Custom Tiles: Creation

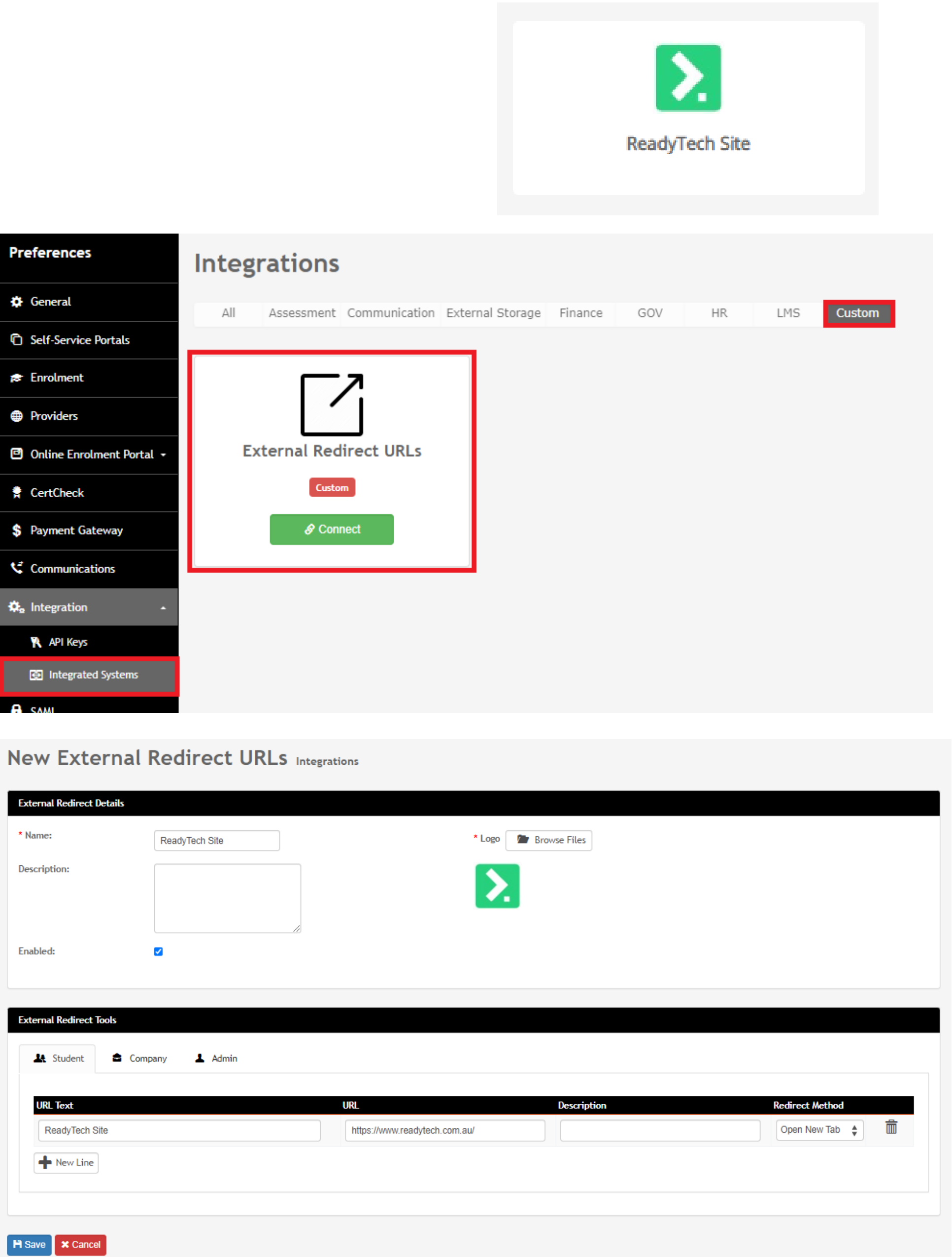
There is the ability to create custom tiles that will display on the student portal

Administration > Configuration > Preferences > Integration > Integration Systems > new > Custom

This can be a link to any site/page you would like

NOTE!

You can have multiple of custom tiles set up

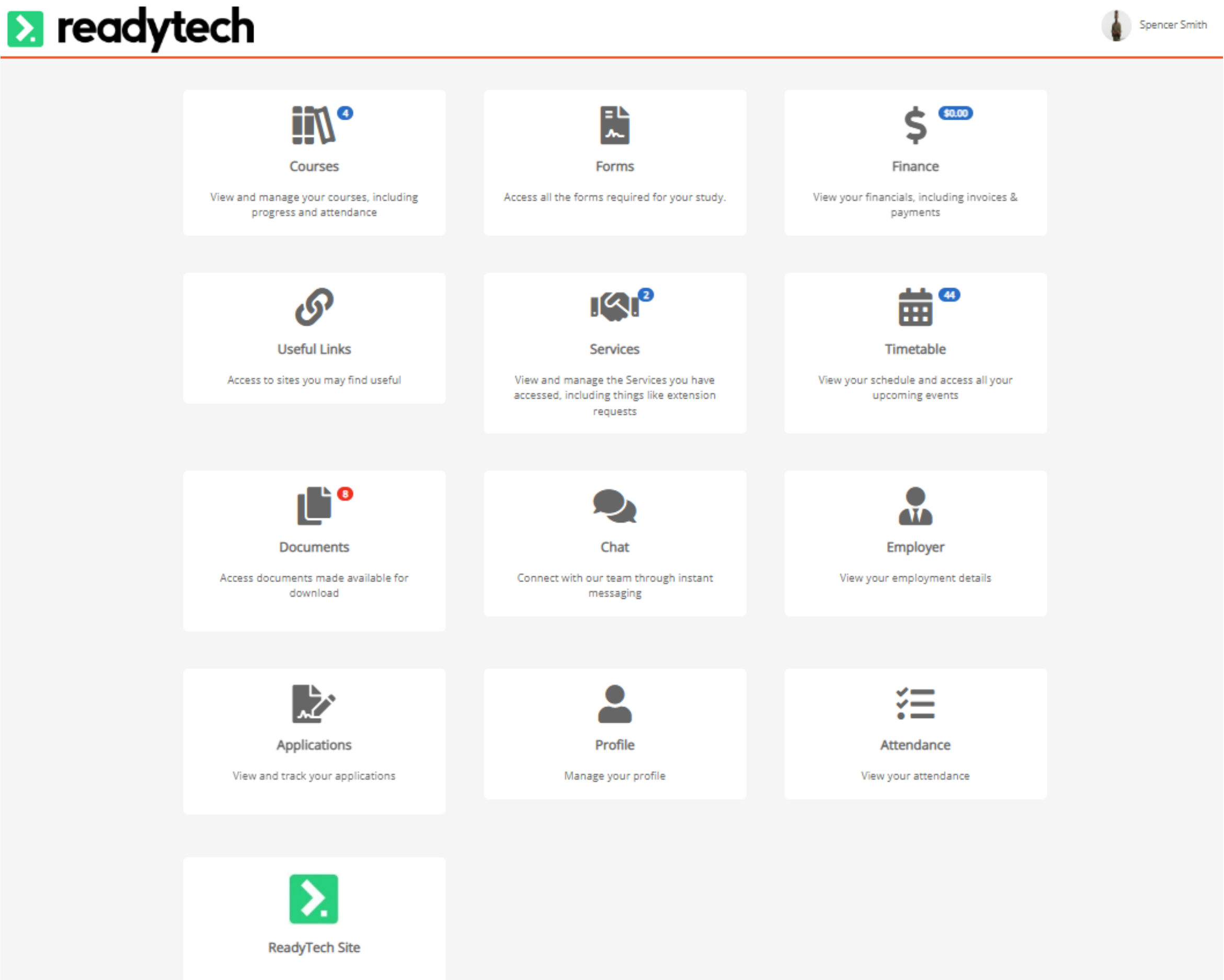


Dashboard

Custom Tiles: Student View

Once set up, the tile will be visible at the bottom of the page in the student portal

The look of this tile will depend on the image you included during setup



Lets go do it!

Let's take a look at:

- The Student Portal
 - View a course
 - View Timetable
 - Submit an assessment
 - Complete a form



Trainer View

Admin View



Q

1





Bridgette Kaminski
ReadyTech Education

 Home

 Community

 Enrolments

 Courses

 Scheduling

 Services

 Sales

 Communications

 Reports

 Administration

 Help

Trainer View




Q








Tom Troop
ReadyTech Education


 Home


 Enrolments

 Courses

 Scheduling

 Sales

 Communications

 Help



ReadyTech Education

459

Trainer View

Licences

The Trainer view has licenses attached to it
You can review how many licenses you have available

[Help](#) > [About](#) > [Users](#) > [Trainers](#)

If you need additional licenses, please reach out to customer success for more information

Users						
Provider	System Administrator	General Administrator	Sales/Marketing	Trainers	Student Support	Agents
ReadyTech Education	3	0	0	4	0	3
Active / Total Subscriptions	3 / 10	0 / 5	0 / 5	4 / 5	0 / 5	3



Trainer View Access



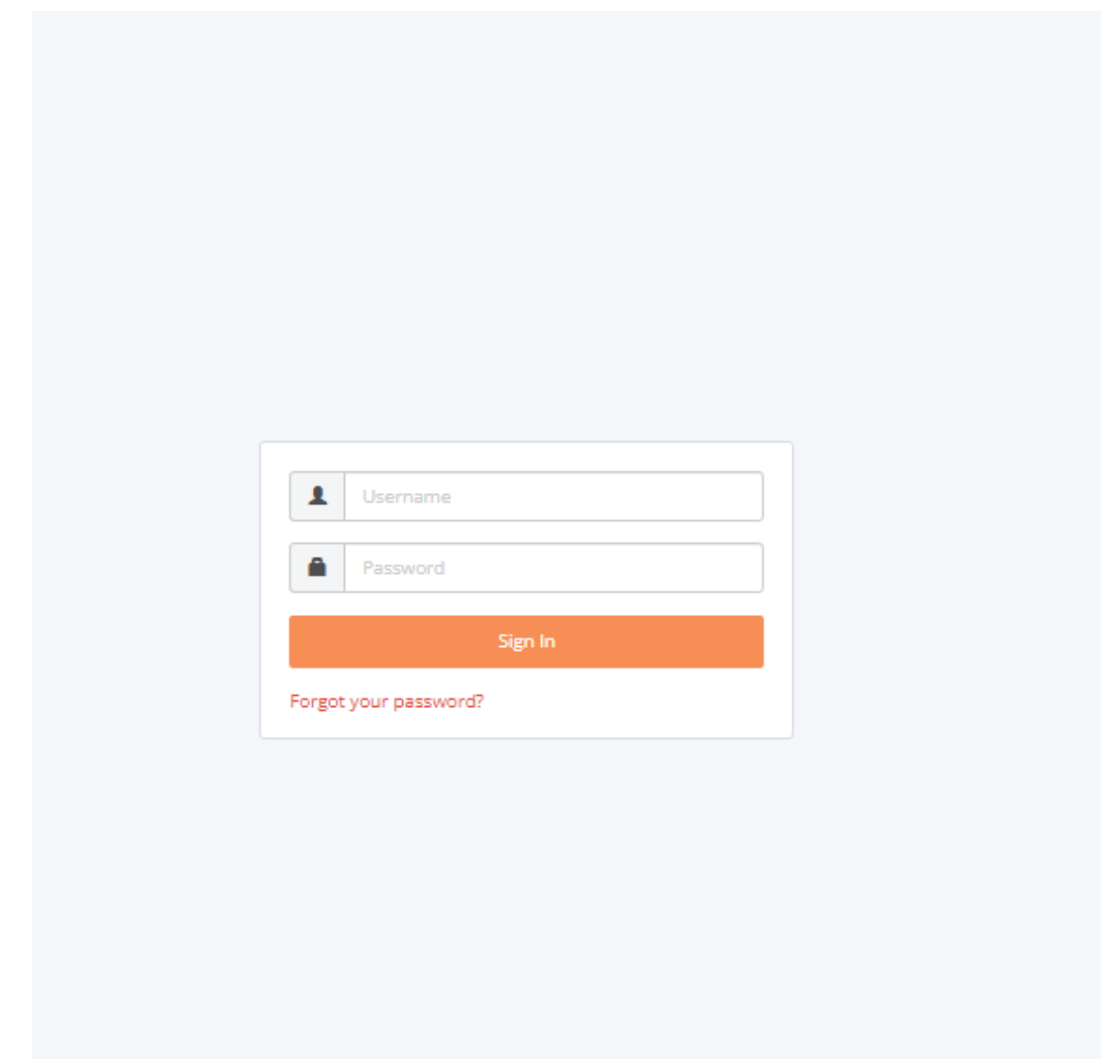
Trainer View Access

As a Trainer

Use the same URL as admin and students
Individual username and password

<https://yoursite.jobreadyplus.com/>

<https://yoursite.vettrakcloud.com.au/>



Trainer View Access

How to give access

It is vital that all users have their own account

[Administration](#) > [Security](#) > [Users](#)

Select that the party is an Academic, then select the appropriate role

New User


Existing Party

Search and find an existing Party to make them a User.

New Party

Create a new Party and make them a User

Search Results for "Tom"



First Name	Surname	Party ID	DOB	Email	Contact Number
Tom	Troop	00020015	15/4/1983	N/A	N/A

1 - 1 of 1

1 Page

Party > Troop, Tom > User New

*User ID
Enabled: ☒ User is currently active
Academic: ☒
Simplified View: ☐
Password Party will receive Password Reset Email

Start Date
End Date
Access Level
Last Login

Current Roles

Action	Role	Description
This user has no roles		

Available Roles

Action	Role	Description
<input checked="" type="checkbox"/> Add	Access to all Courses	In addition to their own courses, a trainer user with this role will also have access to all other courses
<input checked="" type="checkbox"/> Add	Access to all Students	In addition to their own students, a trainer user with this role will also have access to all other students
<input checked="" type="checkbox"/> Add	Access to Letters & Forms	Allow the trainer to generate letters and forms
<input checked="" type="checkbox"/> Add	Access to Reports	Allow the trainer to run student and course reports (not financial reports)
<input checked="" type="checkbox"/> Add	Access to Staff records	Allow the trainer to see other staff records
<input checked="" type="checkbox"/> Add	Basic Trainer Access	Basic access rights for trainer users (view own courses/students, mark attendance, add file notes, documents)
<input checked="" type="checkbox"/> Add	Enter Outcomes	Allow the trainer to enter outcomes

Trainer View Access

Available Roles

Roles define system access

For example:

Basic Trainer Access

Only allows Trainers to view their own courses/students

Access to all Courses

Gives access to everything of that type including things not assigned to the Trainer

Enter Outcomes

Enables Trainers to add outcomes/results for students

Available Roles		
Action	Role	Description
<input type="checkbox"/> Add	Access to all Courses	In addition to their own courses, a trainer user with this role will also have access to all other courses
<input type="checkbox"/> Add	Access to all Students	In addition to their own students, a trainer user with this role will also have access to all other students
<input type="checkbox"/> Add	Access to Letters & Forms	Allow the trainer to generate letters and forms
<input type="checkbox"/> Add	Access to Reports	Allow the trainer to run student and course reports (not financial reports)
<input type="checkbox"/> Add	Access to Staff records	Allow the trainer to see other staff records
<input type="checkbox"/> Add	Basic Trainer Access	Basic access rights for trainer users (view own courses/students, mark attendance, add file notes, documents)
<input type="checkbox"/> Add	Enter Outcomes	Allow the trainer to enter outcomes

Lets go do it!

Let's take a look at:

- Give a Trainer access to the system



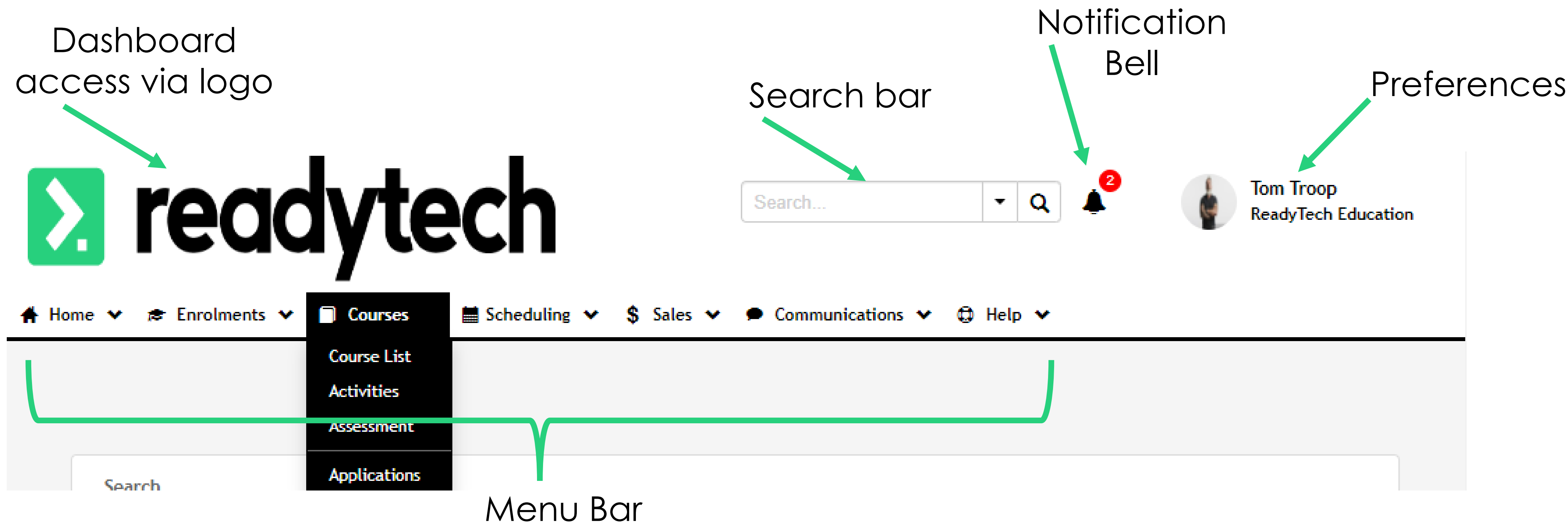
 readytech



Navigation



Navigation



Navigation


Search bar

Filter results

List of results

Blue hyperlinks will take you to the record

Side navigation



Search...

🔍

🔔

Tom Troop
ReadyTech Education

Home

Enrolments

Courses

Scheduling

Sales

Communications

Help

Courses

Search

Course Name, Code, Location

Filters

Saved Filters

Search

Save

Clear

Export

Search Results

📄


1 - 5 of 5

1 Page

Course Number	Program Code	Name	Location, State	Start Date	Enrolments	Active Students	Coordinator	Assessor	Academic	Other Academic
CSEREA00021	FNS50222	Diploma of Accounting (Linking Smart Fees to a Course)	Melbourne CBD Office, VIC	1/5/2023	0/0	0	Bridgette Trainer	Tully Trump	Tom Troop	Tully Tywin
CSEREA00032	FNS50222	Diploma of Accounting (Course - Smart Fee)	Melbourne CBD Office, VIC	1/5/2023	1/0	1	Bridgette Trainer	Tully Trump	Tom Troop	Tully Tywin
CSEREA00033	FNS50222	Diploma of Accounting (Unit - Smart Fee)	Melbourne CBD Office, VIC	2/5/2023	1/0	1	Bridgette Trainer	Tully Trump	Tom Troop	Tully Tywin
CSEREA00034	FNS50222	Diploma of Accounting (CSEREA00034)	Launceston Office, TAS	1/5/2023	2/0	2	Bridgette Trainer	Tom Troop	Tully Tywin	Tom Thomas
CSEREA00026	PD1	Professional Development One (CSEREA00026)		1/5/2023	10/999	10	Bridgette Trainer	Tyler Trent	Tom Troop	Tully Trump

1 - 5 of 5

1 Page



Search...

🔍

🔔

Tom Troop
ReadyTech Education

Home

Enrolments

Courses

Scheduling

Sales

Communications

Help

Course

Course

Details

Requirements

Students 5

Timetable

Notes / Checklists 1

Email

SMS

Documents 0

Bulk Actions

Prospects 0

Course Applications 26

Summary

Starts - 1/5/2023

CSEREA00026

🔔

⚙️

Main

Course Number: CSEREA00026

Name: AVETMISS Code: PD1

Program: Professional Development One

Course Status: Tags: Location: Cost Centre: State/Region:

Start Date: 1/5/2023

End Date: 30/6/2023

Allow Enrolments: ☒

Enrolment Start: 1/3/2023

Enrolment End: 30/6/2023

Max Enrolments: 999

Min Enrolments: 0

Rating: ☆☆☆☆ 0

Brand:

Resources

Coordinator: Bridgette Trainer

Assessor: Tyler Trent

Company Linked: ☐

Academic: Tom Troop

Other Academic: Tully Trump

Agent Linked: ☐

Settings

Report: ☐

Offer Type: ☐

Unit of Study (Subjects):

Delivery Mode: Internal only

Study Reason: Study Period: Start Time:



Recording Activity

ReadyTech Education







Recording Activity




Link Trainer to Course


To link you will need to list the Trainer under the resource section of the course

Course > Course List > select course > Resources

 CSEREA00034  

 Main

Course Number:	CSEREA00034	Start Date:	1/5/2023
Name:		End Date:	31/5/2023
AVETMISS Code:	FNS50222	Allow Enrolments:	<input checked="" type="checkbox"/>
Program:	Diploma of Accounting	Enrolment Start:	
Course Status:		Enrolment End:	
Tags:		Max Enrolments:	0
Location:	Launceston Office, Australia 	Min Enrolments:	0
Cost Centre:		Rating:	☆☆☆☆☆ 
State/Region:	Tasmania	Brand:	

 Resources

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

Recording Activity

View Courses

A Trainer can login and view all the courses they are assigned to

Enables Trainer to view all Course information

Course > Course list > select course

Courses

Search

Course Name, Code, Location

Filters

Saved Filters

Search

Save

Clear

Export

Search Results

1 - 5 of 5

1 Page

Course Number	Program Code	Name	Location, State	Start Date	Enrolments	Active Students	Coordinator	Assessor	Academic	Other Academic
CSEREA00021	FNS50222	Diploma of Accounting (Linking Smart Fees to a Course)	Melbourne CBD Office, VIC	1/5/2023	0/0	0	Bridgette Trainer	Tully Trump	Tom Troop	Tully Tywin
CSEREA00032	FNS50222	Diploma of Accounting (Course - Smart Fee)	Melbourne CBD Office, VIC	1/5/2023	1/0	1	Bridgette Trainer	Tully Trump	Tom Troop	Tully Tywin
CSEREA00033	FNS50222	Diploma of Accounting (Unit - Smart Fee)	Melbourne CBD Office, VIC	2/5/2023	1/0	1	Bridgette Trainer	Tully Trump	Tom Troop	Tully Tywin
CSEREA00034	FNS50222	Diploma of Accounting (CSEREA00034)	Launceston Office, TAS	1/5/2023	2/0	2	Bridgette Trainer	Tom Troop	Tully Tywin	Tom Thomas
CSEREA00026	PD1	Professional Development One (CSEREA00026)		1/5/2023	10/999	10	Bridgette Trainer	Tyler Trent	Tom Troop	Tully Trump

1 - 5 of 5

1 Page

Course

Course

Details

Requirements

Students 2

Timetable

Notes / Checklists 0

Email

SMS

Documents 0

Bulk Actions

Prospects 0

Course Applications 0

Summary

Starts - 1/5/2023

Ends - 31/5/2023

Enrolments

Minimum: 0

CSEREA00034

0

Main

Course Number: CSEREA00034

Name: AVETMISS Code: FNS50222

Program: Diploma of Accounting

Course Status:

Tags:

Location: Launceston Office, Australia

Cost Centre:

State/Region: Tasmania

Start Date: 1/5/2023

End Date: 31/5/2023

Allow Enrolments: ☒

Enrolment Start:

Enrolment End:

Max Enrolments: 0

Min Enrolments: 0

Rating: ☆☆☆☆☆ 0

Brand:

Resources

Coordinator: Bridgette Trainer

Assessor: Tom Troop

Company Linked: ☐

Academic: Tully Tywin

Other Academic: Tom Thomas

Agent Linked: ☐

Settings

Report: ☒

Offer Type: ☐

Unit of Study (Subjects): ☐

Unit Outcome: National Reporting (Australia)

Use Unit Scope Outcome: ☐

Element Grading: ☐

Assessment: ☐

Delivery Mode: Combination of internal and external

Study Reason:

Study Period:

Start Time:

End Time:

Invoice Template:

Automatic SmartFees: ☐

Specialisation:

Recording Activity

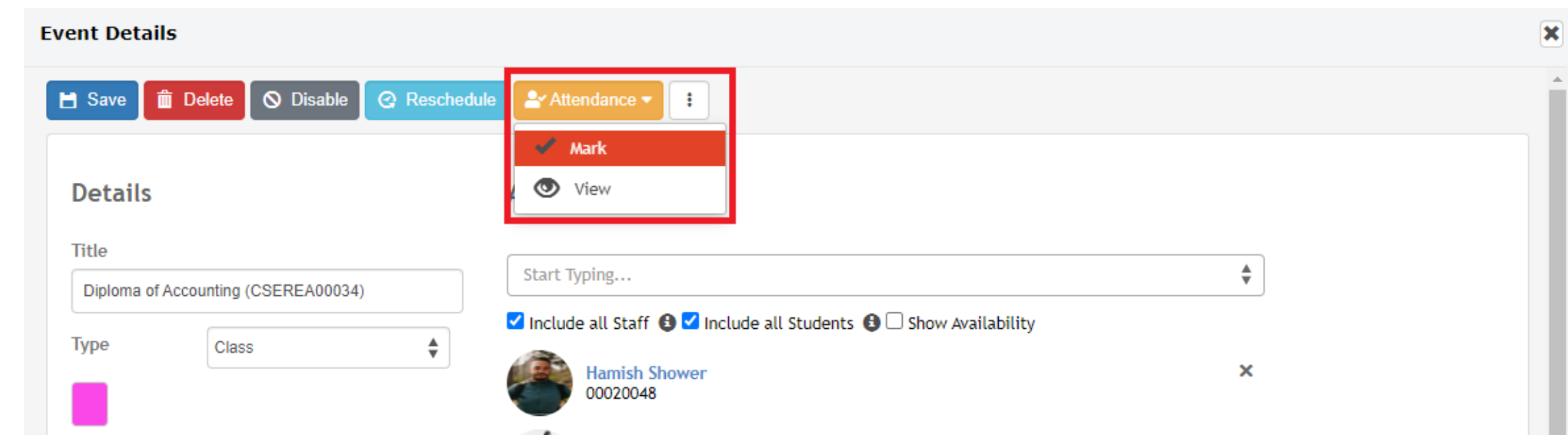
Record Attendance for an Event

Course > List Course > select course > Timetable > Calendar View > select event > Attendance > Mark

You can record:

- Present (and when)
- Absent (and why)
- Message/note (add additional information)

Bulk attendance will apply the set status to all students in the event , then you can modify individual students as necessary.



Attendance Edit - Diploma of Accounting (CSERE00034)

Save Cancel

Diploma of Accounting (CSERE00034)



Date: 13/3/2023

Time: 11:00 AM - 12:30 PM 1:30 hrs

Location: Melbourne Room 2 - Melbourne CBD Office

Students

Bulk

Known							Attendance Status	
Name	By	Age	Party ID	Gender	Nationality	Attendance		
 Hamish Shower			00020048		Not Stated	<div><div>Present</div><div>Absent</div></div> <div>Time</div> <div>11:00AM to 12:30PM</div>	<div></div>	<div></div>
 Stephen Smith			00020004	Male	Not Stated	<div><div>Present</div><div>Absent</div></div> <div>Reason</div> <div>Sick</div>	<div>Full Time</div>	<div></div>

Notes: Sent an email to inform unwell.
Has forward work from today's lesson.

Recording Activity

Record Attendance in Bulk

Attendance can be taken for multiple events at once

Course > Course List > select course > Bulk Actions > Attendance

Search for a particular date range

Enter attendance for all students across all the events

Savecancel

From:1/2/2023To:31/5/2023

EventsShow all notes

	Diploma of Accounting (CSEREA00034) (12/3/2023)	Diploma of Accounting (CSEREA00034) (13/3/2023)	Diploma of Accounting (CSEREA00034) (17/3/2023)	Diploma of Accounting (CSEREA00034) (20/3/2023)	Diploma of Accounting (CSEREA00034) (24/3/2023)
	PresentAbsentOutcome Date	PresentAbsentOutcome Date	PresentAbsentOutcome Date	PresentAbsentOutcome Date	PresentAbsentOutcome Date
Attendee	12/3/2023	13/3/2023	17/3/2023	20/3/2023	24/3/2023

Students

<div>Hamish Shower</div> <div>PresentAbsent</div> <div>Add note</div>	<div>PresentAbsent</div> <div>Time11:00AMto12:30PM</div> <div>Add note</div>	<div>PresentAbsent</div> <div>Add note</div>	<div>PresentAbsent</div> <div>Add note</div>	<div>PresentAbsent</div> <div>Add note</div>
<div>Stephen Smith</div> <div>PresentAbsent</div> <div>Add note</div>	<div>PresentAbsent</div> <div>ReasonSick</div> <div>NotesSent an email to inform unwell. Has forward work from today's lesson.</div>	<div>PresentAbsent</div> <div>Reason---</div> <div>Add note</div>	<div>PresentAbsent</div> <div>Reason---</div> <div>Add note</div>	<div>PresentAbsent</div> <div>Reason---</div> <div>Add note</div>

readytech

ReadyTech Education473

Recording Attendance

Calendar

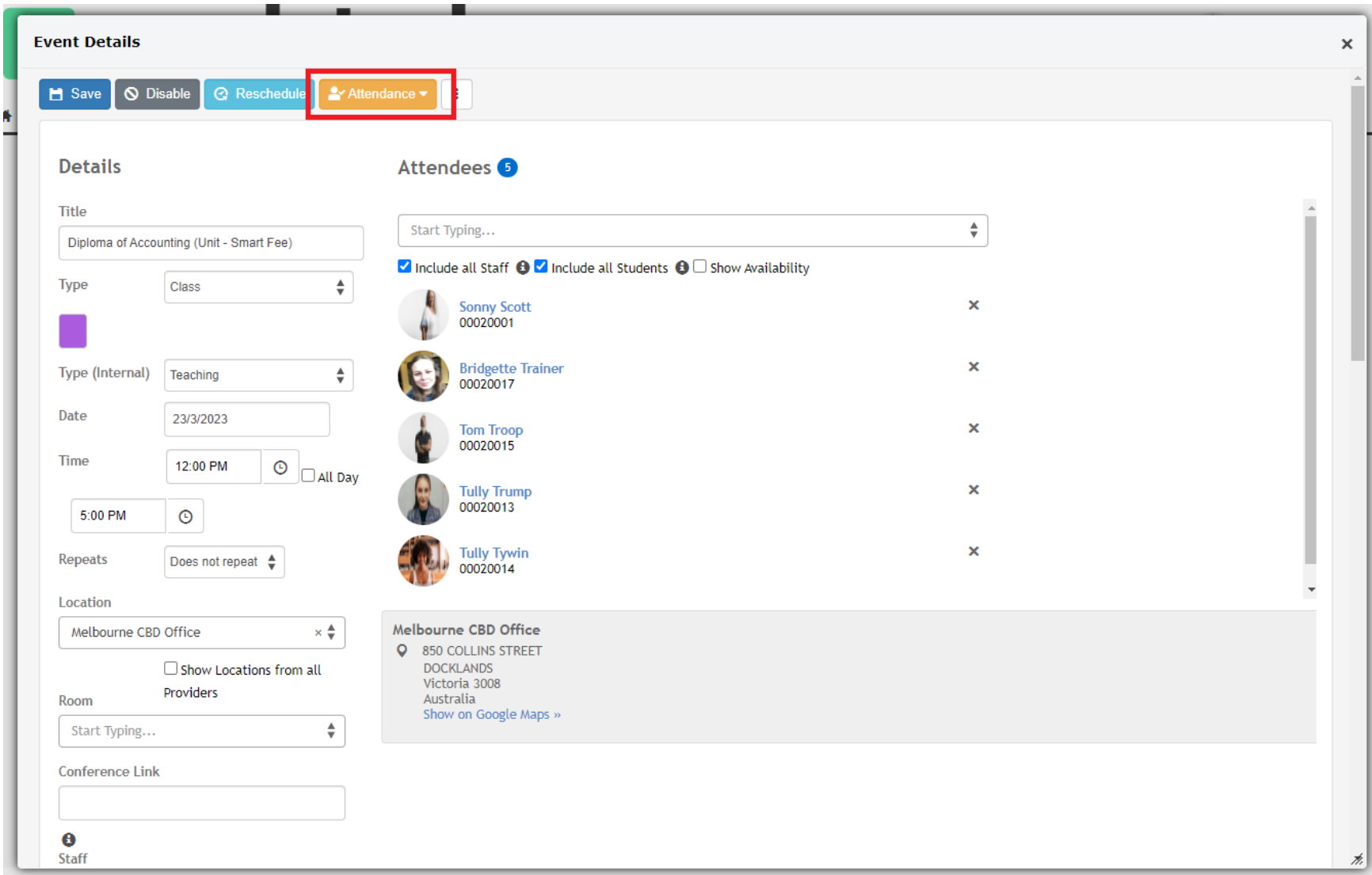
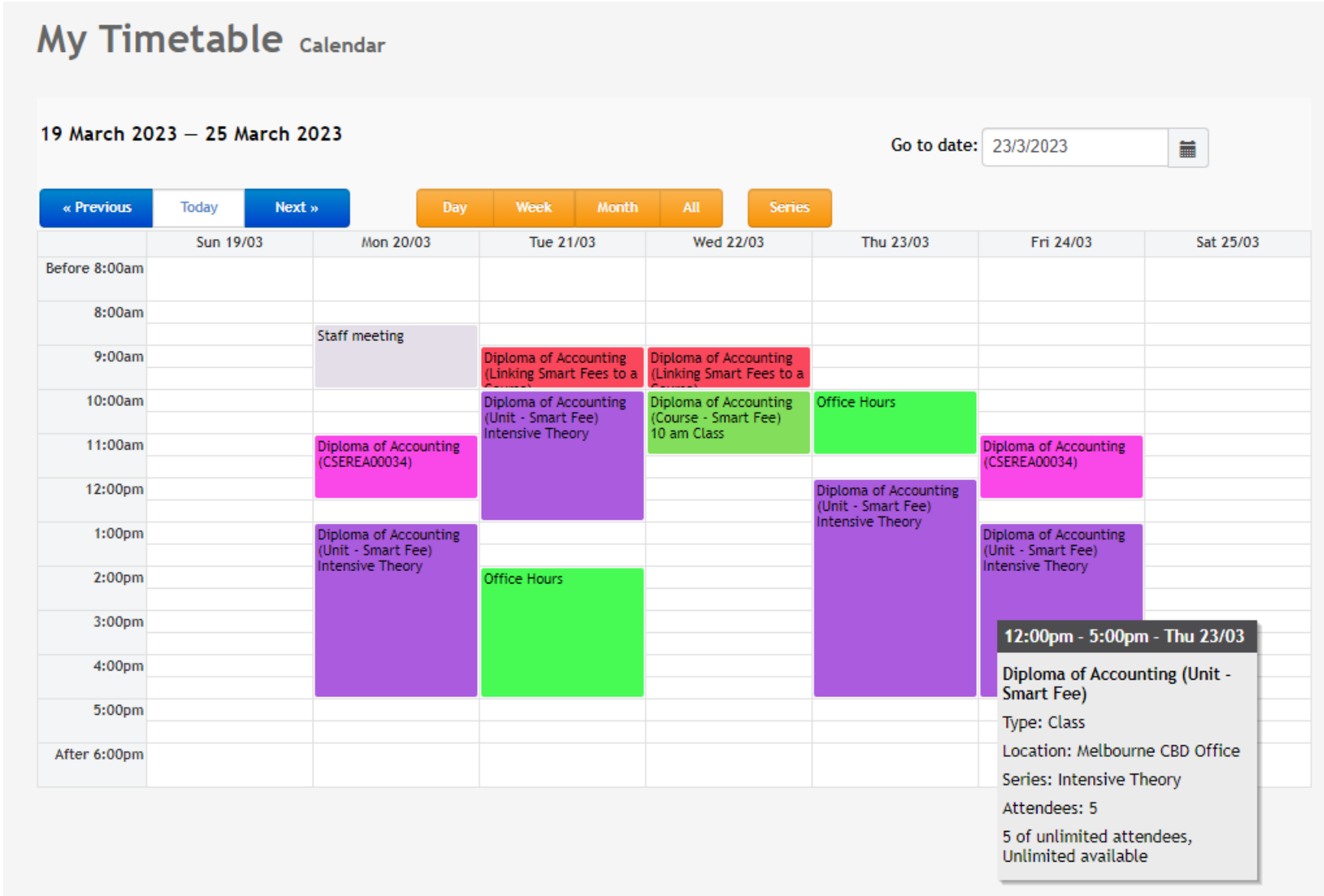
Trainers can see their calendar

Home > Calendar

Hovering over an event shows more information about it

Selecting the event displays additional details

If required, attendance can be recorded from within the additional details page of the opened event



Recording Activity

Record Results Course Level

Course > List Course > select course > Bulk Actions > Unit Grading

Search for the units you wish to record outcomes for

Outcomes can be recorded for individual students or in bulk

Bulk Unit Grading

Diploma of Accounting (FNS50222)

Search

2 selected

Filters

Saved Filters

Search

Save

Clear

Save Changes

Apply economic principles to work in the financial services industry (FNSINC611)

All

Bulk Actions

Student Name	Outcome	Start Date	End Date
<input type="checkbox"/> Hamish Shower 00020048	Continuing enrolment - 70	1/3/2023	
<input type="checkbox"/> Stephen Smith 00020004	Continuing enrolment - 70	1/3/2023	

Apply ethical frameworks and principles to make and act upon decisions (FNSINC514)

Student Name	Outcome	Start Date	End Date
<input type="checkbox"/> Hamish Shower 00020048	Competent - 20	26/2/2023	16/3/2023
<input type="checkbox"/> Stephen Smith 00020004	Continuing enrolment - 70	3/3/2023	

Recording Activity

Record Results Student Level

Course > List Course > select course > Students > select student > Enrolments > select enrolment > Units > Edit

Results for that student can be recorded for all their units

Additional information can be added

Person

Profile

Compliance

Career/Employment

Enrolments 1 / 0

List All

Diploma of Accounting (CSERE00034)

CSERE00034 | 1/5/2023 - 31/5/2023

Finance

Balance: \$-1630.00

Schedule

Notes / Checklists 1 +

Enrolment Details

Student: Stephen

Course: CSE

Program: FNS

Enrolment Status: Active

GPA: 0

Details

Units

Attendance

Events

Fees

Invoice options

Employers

Units Edit - ENREA00246 / Hamish Shower (00020048)

Save

Cancel

Student: Hamish Shower (00020048)

Enrolment ID: ENREA00246

Course: CSERE00036 / Ag May Intake

Start Date: 11/4/2023

Program: AHC10222 / Certificate I in Agriculture

Target End Date: 30/4/2024

Enrolment Status: Active

End Date:

GPA: 0

Brand:

Core

Bulk Actions

TGA Packaging Rules

Code	Unit	Outcome	Start Date	Target End Date	End Date
<input type="checkbox"/>	AHCWHS102	Work safely	Not Competent - 30	1/2/2023	30/6/2023
<input type="checkbox"/>	AHCWRK102	Maintain the workplace			

Elective

Code	Unit	Outcome	Start Date	Target End Date	End Date
<input type="checkbox"/>	AHCMOM101	Assist with routine maintenance of machinery and equipment			
<input type="checkbox"/>	AHCMOM102	Follow basic			

Core

Bulk Actions

TGA Packaging Rules

Code	Unit	Outcome	Start Date	Target End Date	End Date
<input type="checkbox"/>	AHCWHS102	Work safely	Not Competent - 30	1/2/2023	30/6/2023

More Details

Delivery Mode: -- Use Enrolme

Predominant delivery mode: -- Use Enrolme

Assessment Method: -- Use Course \

Withdrawal/Census Date:

Resources

Trainer: -- Use Cours...

Assessor: -- Use Cours...

Enrolment Identifier:

Claims & Funding

Contract: -- Use Enrol...

Funding Source State: -- Use Enrolme

Funding Source National: 20:Domestic full

Eligibility Exemption Indicator: ☐

Fee Exemption State: -- Use Enrolme

VET Disable: ☐

Fees

Tuition Fee: Fees (0)

International

Number Of Weeks:

Traineeship / Apprenticeship

TCID:

Delivering Org ABN:

Outcome Training Organisation:

Lets go do it!

Let's take a look at:

- Basic Navigation
 - Calendar
- Course
 - Record single event attendance
 - Record events attendance in bulk
 - Record results in bulk
- Student
 - Record results for a single student





Assessment Centre

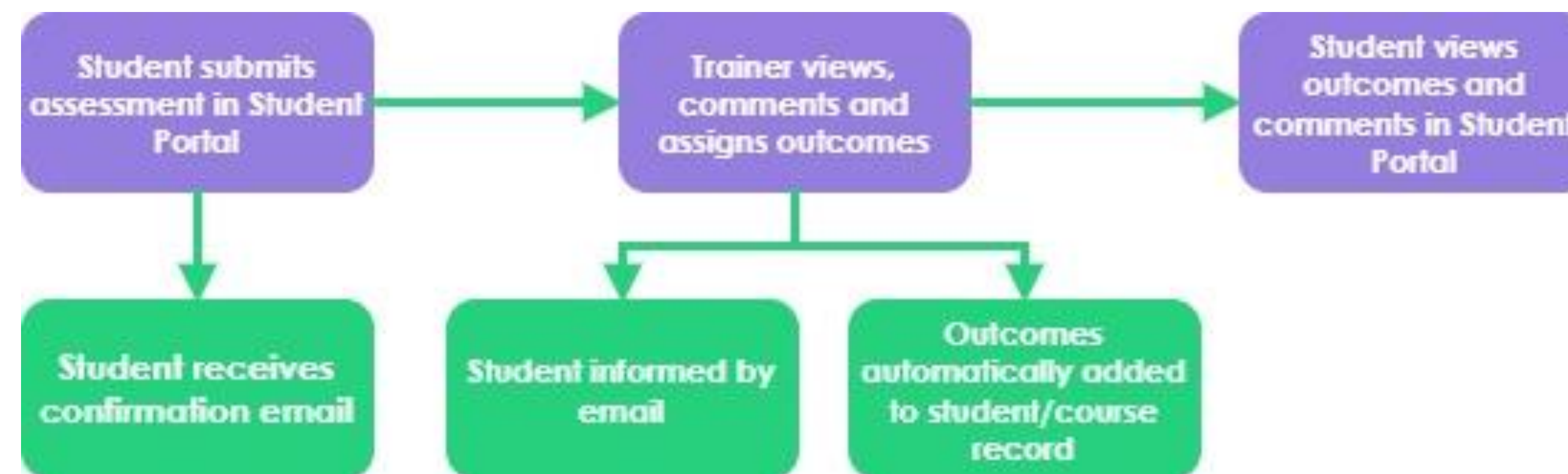


ReadyTech Education

Assessment Centre

Introduction

A convenient feature for assessment submissions and marking



Assessment Centre

Setup: Giving trainer access

Trainers can review student assessments only if they have access on the Course Assessment Centre menu

Admin can enable this during Course creation or by editing the settings post-creation

Course > select course > Details > edit

Assessment Centre

The following assessors may assess students enrolled in this course:

Name	Assignment	RPL Evidence
Tim Tywin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tom Troop	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tyler Trent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tom Thomas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Update

Cancel

Assessment Centre

Setup: Settings

Administration > Configuration > Preferences > Self Service Portals > Student

Tick 'allow assignment submissions' and 'create notes'

Require acceptance of terms

Request acceptance upon submission

Email Template – Assessment marked

Emails student when assignment is marked and results ready to view

Email template – Submission confirmation email

Emails a confirmation upon assignment submission

Admin Required

Preferences

- General
- Self-Service Portals
- Enrolment
- Providers
- Online Enrolment Portal
- CertCheck
- Payment Gateway
- Communications
- Integration
- SAML
- Forms

Self-Service Portals

[Update](#) [Cancel](#)

Student Agent Company Transport Provider CertCheck General

Assessment Centre

Allow assignment submissions	<input checked="" type="checkbox"/>	Email Template - Assessment marked	General: Assessment Marked
Create notes	<input checked="" type="checkbox"/>	Email Template - Submission confirmation email	General: Assessment has been marked
Require acceptance of terms	<input type="checkbox"/>	Max. assignment submissions	
		Max. RPL evidence submissions	

Dashboard

New Dashboard	<input checked="" type="checkbox"/>	Activities	<input type="checkbox"/>
Accommodation	<input type="checkbox"/>	Assignments	<input checked="" type="checkbox"/>
Applications	<input checked="" type="checkbox"/>	Chat	<input type="checkbox"/>
Attendance	<input checked="" type="checkbox"/>	CPD Tracker	<input checked="" type="checkbox"/>
Courses	<input checked="" type="checkbox"/>		

Assessment Centre

Setup: Settings

Require acceptance of terms
Request acceptance upon submission

Submit an Assignment

upload

cancel

Assignment

Course:

Advanced Diploma of Building Design (AdDip Building Design (aNewSpring))

Unit:

Manage business operational plans (BSBOPS502)

*Name:

Files

Choose file

RDY_RWF_SOW_120822 (2).docx

+

Add Another File

Terms and Conditions

By submitting this assignment through the submission portal you are agreeing to ReadyTech's assignment submission policy [www.assignmentsubmissionpolicy.readytech](#)

☐

I agree to the terms stated above

upload

cancel

Admin Required

Preferences

General

Self-Service Portals

Enrolment

Providers

Online Enrolment Portal

CertCheck

Payment Gateway

Communications

Integration

SAML

Forms

Self-Service Portals

Update

Cancel

Student

Agent

Company

Transport Provider

CertCheck

General

Assessment Centre

Allow assignment submissions

✓

Create notes:

✓

Require acceptance of terms:

✓

Email Template - Assessment marked

General: Assessment Marke

Email Template - Submission confirmation email

General: Assessment has bt

Max. assignment submissions

Max. RPL evidence submissions

Assignment Submission Terms and Conditions:

↩

↪

✂

📄

📄

B

I

U

S

🔗

≡

≡

≡

≡

≡

≡

≡

≡

By submitting this assignment through the submission portal you are agreeing to ReadyTech's assignment submission policy [www.assignmentsubmissionpolicy.readytech](#)

readytech

ReadyTech Education

482

Assessment Centre

Setup: Email Templates

Assignment Submission
Communications > Templates > Student

Assessment has been submitted Edit | Letters & Forms Template

Update Cancel Delete

Details

*Name

Assessment has been submitted

From

Subject

Assessment submission complete

Status

☒ Enabled ☐ Disabled

Format

☒ HTML ☐ Text

Type

*Layout

Clear: A4 Portrait

Category

General

Document Category

General

Portal

☒

Authorised User Group

Content

Hi {party[other_name]}.

Your assessment for your Course {course[name]} has been submitted successfully. When marks and comments become available, they will be available within the Student Portal under the "Courses" tile.

Course

assessment_method

assessor_email

assessor_name

Assessment Marked
Administration > Templates > Entities > Assessment

Assessment Marked Edit | Letters & Forms Template

Update Cancel Delete

Details

*Name

Assessment Marked

From

Subject

Assessment Marked

Status

☒ Enabled ☐ Disabled

Format

☒ HTML ☐ Text

Type

Course Information

*Layout

Clear: A4 Portrait

Category

General

Document Category

Student Communications

Portal

☒

Authorised User Group

Content

Hi {party[other_name]}.

Your submitted assignment for you Course {course[name]} have been updated. Please navigate the to the Student Portal and select the "Courses" tile to view assessment feedback and marks.

Assessment

assessed_by_fullname

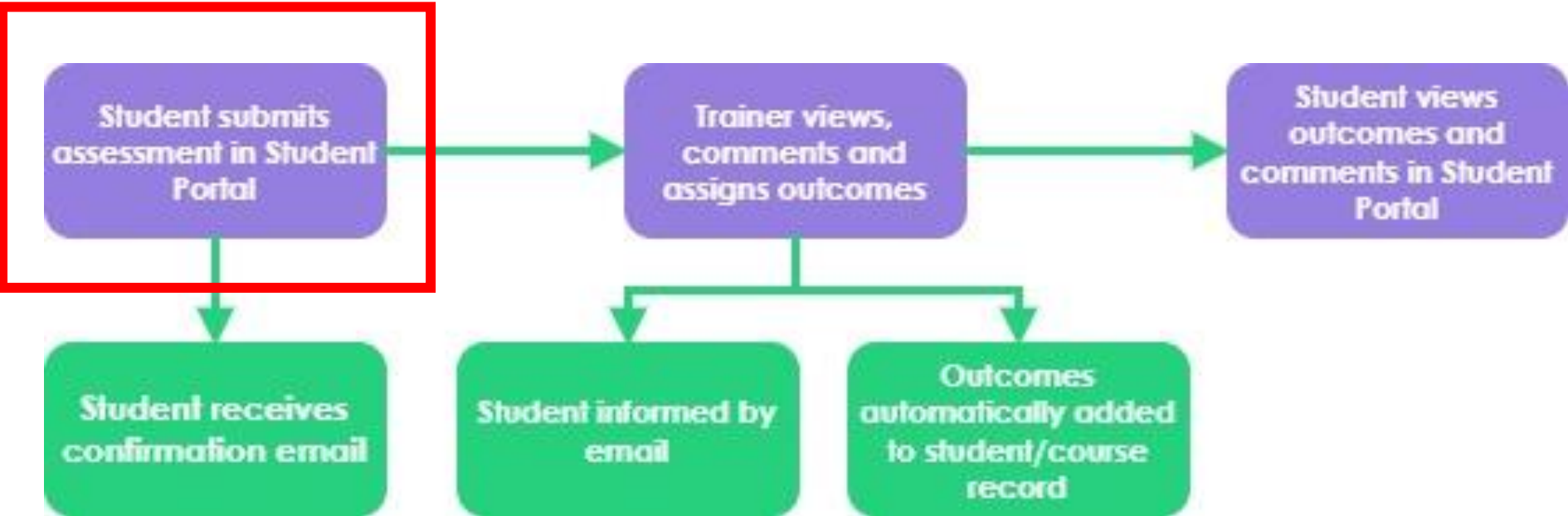
assessed_by_userid

Admin Required

Assessment Centre

1. Student Submits Assessment

Student Portal > Assignments > upload



Submit an Assignment

upload cancel

Assignment

Unit: Professional Development One (PD1)

*Name: Assignment 1

Files

Choose file Assignment 1.docx

+ Add Another File

upload cancel

Documents

✓ Assignment was successfully submitted.

Search

Enter document name...

Q Search X Clear

Uploaded Assignments 1 Other 10

Personal	Code	Number of Documents
Smith, Spencer	00020006	1

Assessment Centre

2. Access Assessments

Trainers review assessments submitted by a student

Course > Assessment

Click the eye to view



Assessment Centre

Search

Student Name

Filters

Saved Filters

Course

Professional Development One (CSEREA00026)

X

Search

Save

Clear

Search Results

Has Submission

1 - 1 of 1

1 Page

Student	Unit, Subject or Enrolment	Latest Submission	Last Assignment	Resubmission	Outcome	Assessed
Spencer Smith (00020006)	Professional Development One (PD1)	5 April 2023 11:13 AM		-	-	No

1 - 1 of 1

1 Page

Assessment Centre

Search

Student Name

Filters

Saved Filters

Course

Professional Development One (CSEREA00026)

X

Search

Save

Clear

Search Results

Has Submission

1 - 1 of 1

1 Page

Student	Unit, Subject or Enrolment	Latest Submission	Last Assignment	Resubmission	Outcome	Assessed
Spencer Smith (00020006)	Professional Development One (PD1)	5 April 2023 11:13 AM		-	-	No

Start Assessing

Details

Outcome: Start Date: End Date:

Note:

Assignment Submissions

New

Name	Description	Uploaded By	Date Submitted	Assessed By	Date Assessed	Files	Terms Accepted
Assignment 1		Smith, Spencer	5 April 2023 11:13 AM	Not yet assessed		1	No

Start Assessing

Assessment Centre

3. Add outcomes and comments

Trainers can:

- Download the document
- Record an outcome
- Record some notes about the item

Search Results

Has Submission ▾ 1 - 1 of 1 1 Page

Student	Unit, Subject or Enrolment	Latest Submission ▾	Last Assignment	Resubmission	Outcome	Assessed
Spencer Smith (00020006)	Professional Development One (PD1)	5 April 2023 11:13 AM		-	-	TomTroop91 is assessing

Assessed Unassessed Save Clear ⚠ Unsaved changes have been made

Details

Outcome: Competent - 20 Start Date: 5/4/2023 End Date: 5/4/2023

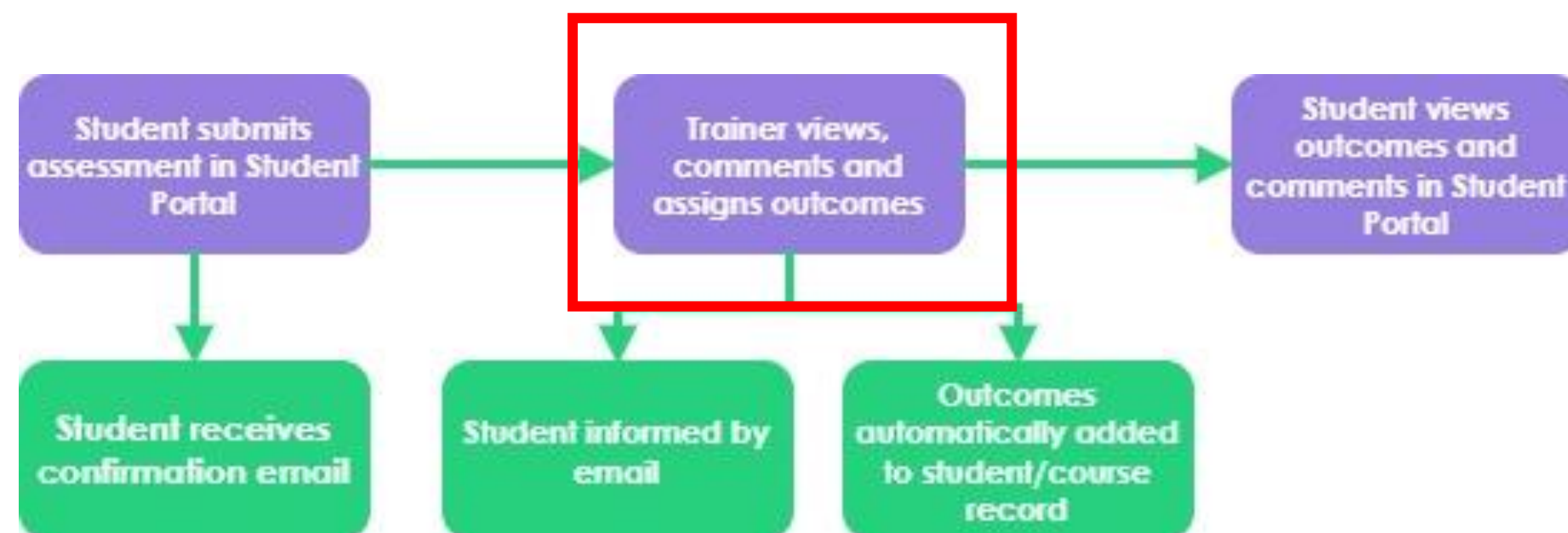
Note: Good job

Assignment Submissions

+ New

Name	Description	Uploaded By	Date Submitted	Assessed By	Date Assessed	Files	Terms Accepted
Assignment 1		Smith, Spencer	5 April 2023 11:13 AM	Not yet assessed		1	No

Assessed Unassessed Save Clear ⚠ Unsaved changes have been made

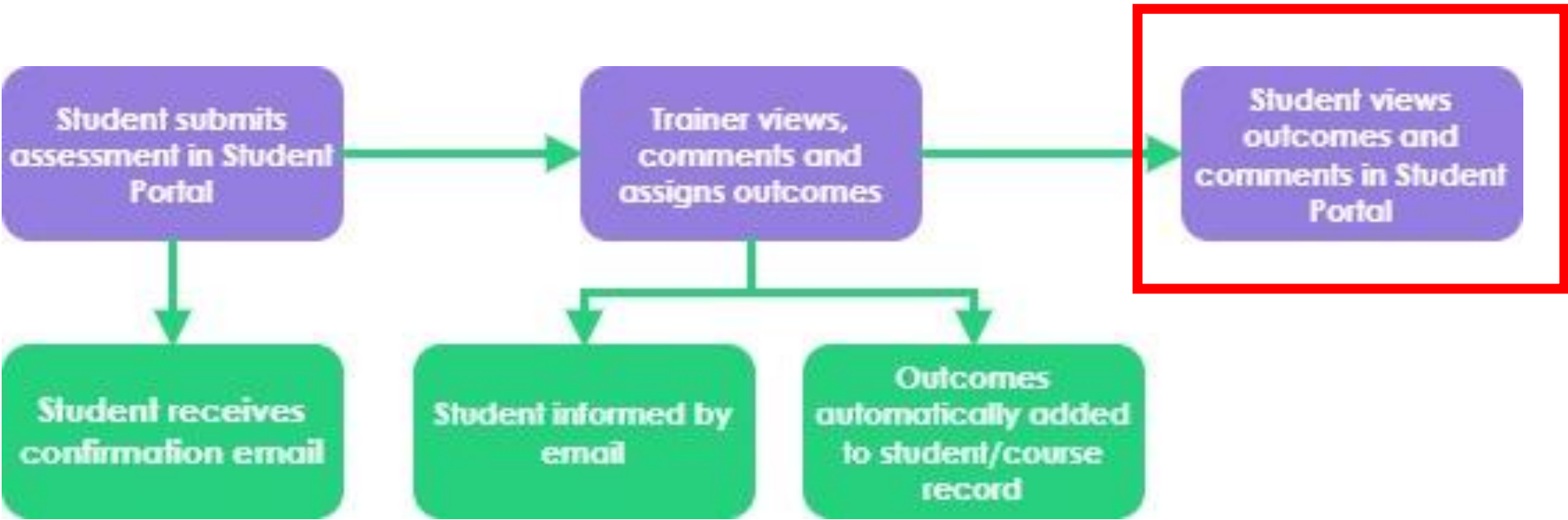


Assessment Centre

4. Students view outcomes

Students can view outcomes and comments made by the Trainer immediately

Student Portal > Course > Select Course > Progress > unit



readytech

Spencer Smith

Dashboard

General

Courses 10

Activity/Leisure

Services 2

Extension Requests

Employer

Useful Links

Timetable

Documents 15 new

Forms

Assignments

Finance

Applications

Professional Development One (CSEREA00026) CSEREA00026

Enrolment Details

Course: CSEREA00026 /

Start Date: 1/5/2023

Program: PD1 / Professional Development One

Target End Date: 30/6/2023

Enrolment Status: Completed

End Date: 5/4/2023

Details

Progress

Events/Attendance

Finance

Units

Core/Elective

Code	Unit	Outcome	Start Date	Target End Date	End Date	Last Assessed
CORE UNITS						
PD1	Professional Development One (PD1)	Competent	5/4/2023		5/4/2023	5/4/2023
STREAM UNITS						

readytech

ReadyTech Education

487

Assessment Centre

NOTE



This process differs for Higher Education or if using Academic Periods
Please reach out to Support if you would like to use Assessment Centre
under these conditions

Lets go do it!

Let's take a look at:

- Mark an assignment



 readytech



Communication



ReadyTech Education

Notes and Checklists

What are they?

Notes and/or checklists can be recorded against:

- Party Records
Course > List Course > select course > Students > select student > Notes /Checklist
- Courses
Course > Course List > search and select course > Notes /Checklist

Notes record a note against a record with the ability to assign a user and a date

Checklists are pre-configured lists that allow you to assign each item its own person and date

NotesDiploma of Accounting (CSEREA00034)

Edit

WorkbookGeneral

Works books have to be emailed.

Details

For: Diploma of Accounting (CSEREA00034)
Date: 16/3/2023
Category: General
Created By: Tom Troop
Updated By:

Follow Up

Assigned: Tom Troop (User)
Archived: ☐
Status: Open
Priority: Normal
Follow-Up Date: 16/3/2023
Event: None

Privacy

Private: ☐
Show in Student Portal: ☐

NotesDiploma of Accounting (CSEREA00034)

Edit

AssessmentChecklist

Tasks

Complete	Order	Name	Description	Priority	Assignee	Follow-Up Date	Private
<input checked="" type="checkbox"/>	1	Assessment provided to students		Normal	Tom Troop (User)	8/3/2023	<input type="checkbox"/>
<input type="checkbox"/>	2	Rubric provided		Normal	Tyler Trent (User)	16/3/2023	<input type="checkbox"/>
<input type="checkbox"/>	3	Due date reached and work collected		Normal	Tom Troop (User)	30/4/2023	<input type="checkbox"/>
<input type="checkbox"/>	4	Marking completed		Normal	Tom Troop (User)	12/5/2023	<input type="checkbox"/>
<input type="checkbox"/>	5	Moderation compelted		Normal	Tyler Trent (User)	26/5/2023	<input type="checkbox"/>
<input type="checkbox"/>	6	Assessment Completed		Normal	Tom Thomas (User)	28/5/2023	<input type="checkbox"/>

Notes and Checklists

Creation

When creating it's important to be aware of these key areas:

- Template Type – If using a pre-configured template
- Template – The template you would like
- Category – Key for checklist

Course

- Course
- Students 2
- Timetable
- Notes / Checklists 2 +**
- Email
- SMS
- Documents 0
- Bulk Actions
- Prospects 0
- Course Applications 0

Notes Diploma of Accounting (CSEREA00034)

Search
Enter Title Filters Saved Filters

Search Save Clear

Search Results

Title	Date	Assignee	Priority	Follow Up	Status	Public	Private	Belongs To	Category	Created By
Workbook	16/3/2023	Tom Troop (00020015)	Normal	16/3/2023	Open	<input type="checkbox"/>	<input type="checkbox"/>		General	Tom Troop (00020015)
Assessment	16/3/2023	Tom Troop (00020015)	Normal	31/3/2023	Open	<input type="checkbox"/>	<input type="checkbox"/>		Checklist	Tom Troop (00020015)

1 - 2 of 2 1 Page

Note New Diploma of Accounting (CSEREA00034)

Create Cancel

Note

Template Checklist Category Checklist Date 16/3/2023
Type Checklist
Template No results found

*Title
Assessment
0 characters

Notes and Checklists

View Tasks

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

- 1. The dashboard - task's widget
- 2. Home > Task List

You can filter this list

Talk to your administrator if you would like a new checklist built

Tasks

Follow-Up Date

1/3/2023 - 31/3/2023

Filters

Saved Filters

Assignee

User: Tom Troop (00020015)

Status

Open

Search

Save

Clear

Today

Week

Future

Export

Bulk Actions

1 - 6 of 6

1 Page

Date	Priority	Type	Category	Instance	Name	Assignee	Follow Up	Status	Stage	Private	
15/3/2023	Normal	Party	General	Shower, Hamish	Sign off required	TomTroop91	15/3/2023	Open		<input type="checkbox"/>	
15/3/2023	High	Party	General	Smith, Stephen	New Training plan	TomTroop91	20/3/2023	Open		<input type="checkbox"/>	
15/3/2023	High	Party	General	Smith, Mia	Extension	TomTroop91	20/3/2023	Open		<input type="checkbox"/>	
15/3/2023	Low	Party	General	Spacer, Joseph	Doctors note	TomTroop91	15/3/2023	Open		<input type="checkbox"/>	
16/3/2023	Normal	Course	Checklist	Diploma of Accounting (CSERE00034)	Assessment	TomTroop91	31/3/2023	Open		<input type="checkbox"/>	

Checklist

Tasks

Complete	Order	Name	Description	Priority	Assignee	Follow-Up Date	Private
<input checked="" type="checkbox"/>	1	Assessment provided to students		Normal	Tom Troop (User)	8/3/2023	<input type="checkbox"/>
<input type="checkbox"/>	2	Rubric provided		Normal	Tyler Trent (User)	16/3/2023	<input type="checkbox"/>
<input type="checkbox"/>	3	Due date reached and work collected		Normal	Tom Troop (User)	30/4/2023	<input type="checkbox"/>
<input type="checkbox"/>	4	Marking completed		Normal	Tom Troop (User)	12/5/2023	<input type="checkbox"/>

Lets go do it!

Let's take a look at:

- Create a new note for a course



Summary

What have we done today?

Student Portal

- Portal system preferences
- Student portal access
- Dashboard

Trainer View

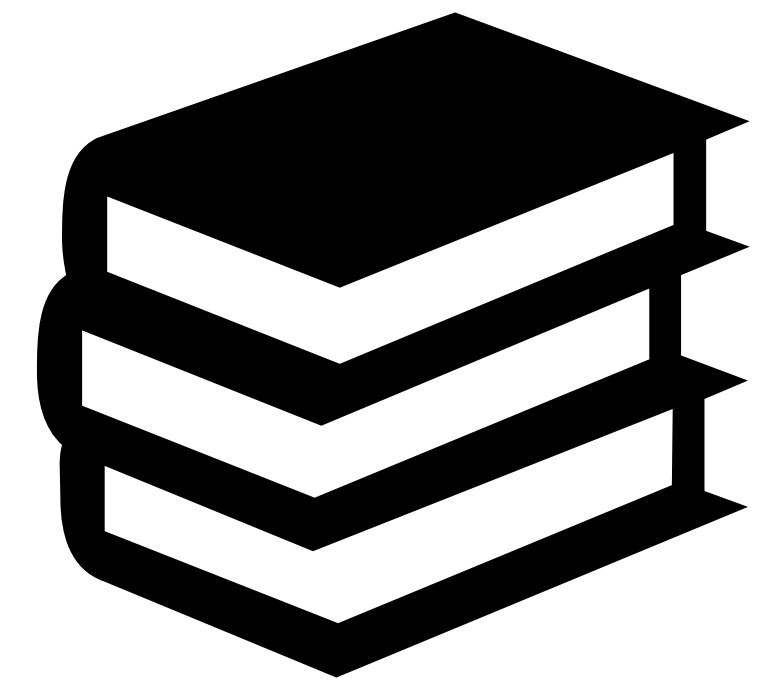
- Navigation
- Trainer portal access
- Recording activity
- Review assessments
- Communication



Action Items

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

- Enable the new dashboard
- Provide students access to the Student Portal
- Login to the Student Portal and view profile details, courses and events
- Set settings and create email templates for assessment process
- Set up your trainers with access to the system
- Trainers:
 - Record attendance
 - Record a result
 - Review the Trainers Calander
 - Create a new note for a course

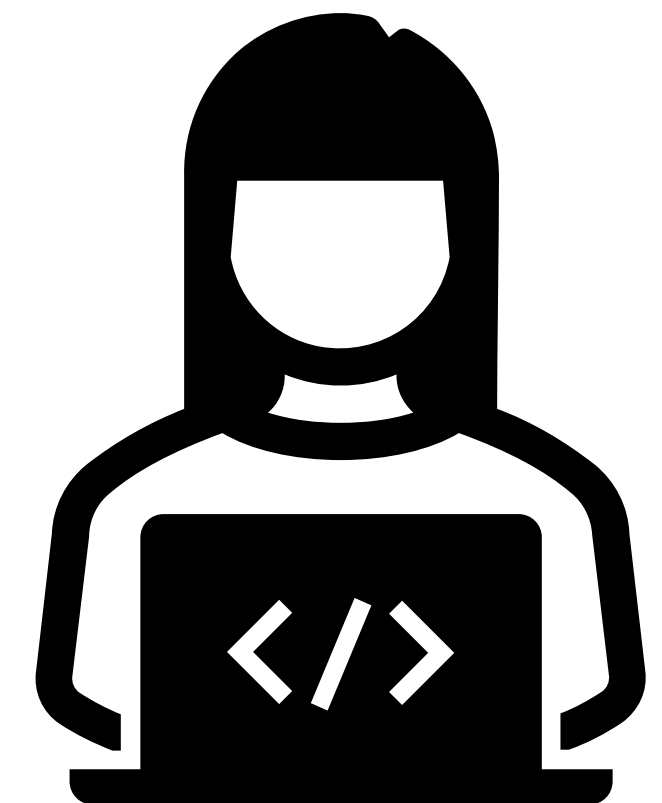


Enjoyed today's session?

[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



What Now?

Please sign up to hear about:

- Product updates
- Upcoming webinars

Please reach out to marketing@ewp.readytech.io and request to be added to our email marketing list



Hi

We're constantly working to improve your experience, here's a summary of what is changing:

Key Changes:

- NEW: eCAF progressions
- NEW: Smart Fee pricing periods
- IMPROVED: Compliance and general product enhancements

Planned Release Dates:

- **Phase I:** Tuesday 4 April 2023
- **Phase II:** Wednesday 12 April 2023

To ensure you get the most out of our latest release, we'd highly recommend checking out the full release notes below.

[VIEW FULL RELEASE NOTES](#)

Happy reading!

Thank you

For more information please contact:

Support

- E: support@ewp.readytech.io
- P: 02 9018 5525

Onboarding

- E: customeronboarding@ewp.readytech.io