Operations Guide

VERSION 3.0.2023

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About this Document

About PowerPro RTO

PowerPro RTO is a training management system designed to help registered training organisations manage their records in an easy and effective manner.

About this guide

This guide is designed to provide a quick reference for PowerPro RTO users. It covers the RTO day-to-day tasks used on the operational side of VET record keeping.

Other references

There is a [Frequently Asked Questions]() web site for PowerPro RTO which is also accessible from the *Help* menu.

This guide can also be found online using the link below:

https://powerprorto.com.au/tms/op-guide.pdf

Contents

1. Fundamental Concepts

PowerPro RTO allows you to track accredited and non-accredited training records. The main difference between these is highlighted in the following table:

	Accredited Courses	Non-Accredited Courses
Subjects/Outcomes	Units of Competency	In-house Modules
Recognition	National	None
Document issued	Qualification or Statement of Attainment	Certificate of Attendance
Example of Course Name	Certificate II in Music	Employee Induction
Example of National Code	CUS20105	N/A
Part of AVETMISS Collection	Yes	No
Other differences	Units can be imported into the system	Modules must be entered into the system by the user

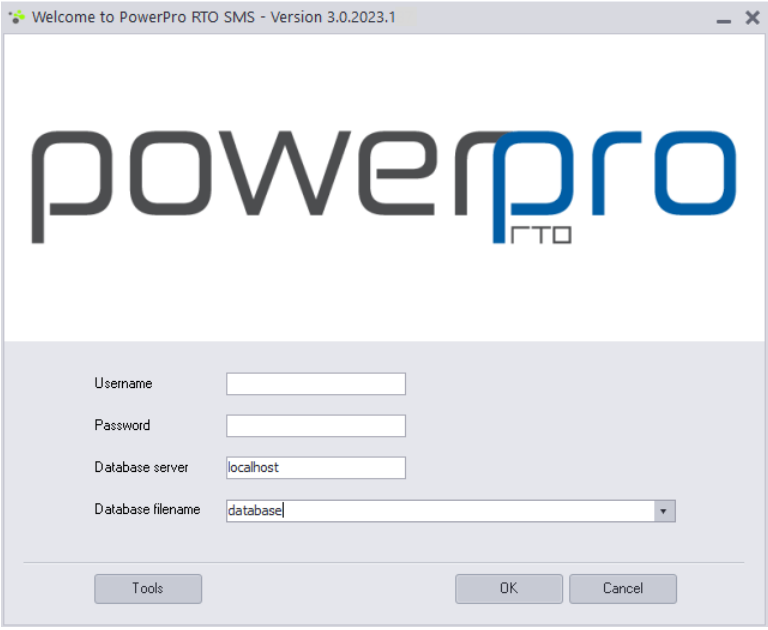
Accredited Courses can be made of a couple of Units (for licensing purposes for example, e.g., Responsible Service of Alcohol, white card, operate a forklift, etc) or they can form a full Qualification. In the first case (usually referred to as “Short Courses”) Clients are issued with a Statement of Attainment upon completion of the Course. On the other hand, when completing a full Qualification Course Clients are issued a Qualification (Certificate II, Diploma, etc) as well as a Record of Results.

The following table summarizes which document(s) are to be issued depending on the Course type as well as the Client outcomes:

Course Type	Documents Issued upon Completion	Example
Full Qualification	Qualification and Record of Results	Certificate IV in Music
Short Course	Statement of Attainment	Course in First Aid
Non-Accredited Course	Certificate of Attendance	Course in Employee Induction

2. Getting started

2.1. Logging in to PowerPro (Local Version)



■ **Figure above – PowerPro RTO login screen**

When logging in to PowerPro all fields must be entered. If you have an empty field for *Database server* or the *Database filename,* please lookup these values on another PowerPro workstation in your organisation.

In most situations *Database server* will be 'localhost' and *Database filename* will be an alias or the location of the database, usually *C:\Program Files\Firebird\Firebird_2_5\RTOV3.FDB*.

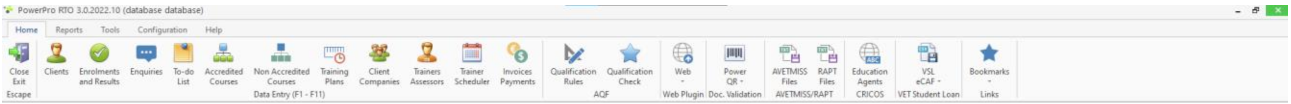
2.2. Logging in to PowerPro Sky

When logging in to PowerPro Sky all fields must also be entered. If you have an empty field for *Database filename,* please lookup this value on another PowerPro workstation in your organisation. The Security Code is generally the RTO Code.

NOTE: These fields are not case sensitive.

2.3. Using Shortcut Keys

The PowerPro toolbar has shortcut keys set up by default to enable quick access:



The shortcut keys as shown in the following table.

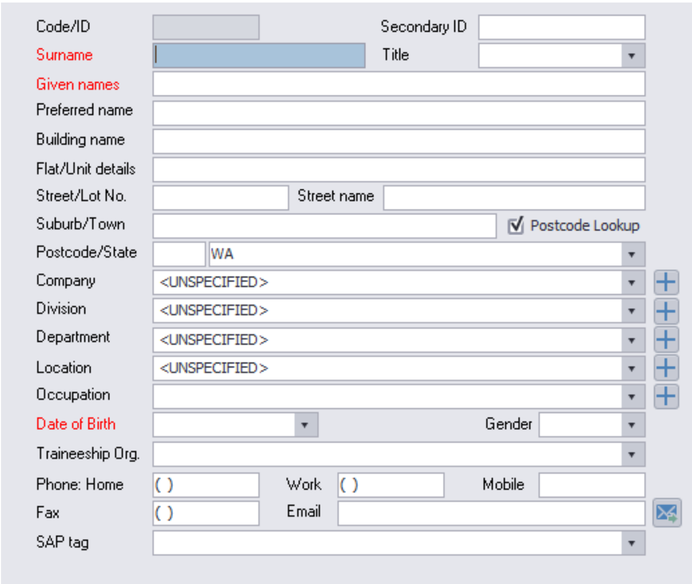
Shortcut Key	Outcome
Esc	Close: close the current window
F1	Clients: maintain or search client details.
F2	Enrolments & Results: maintain course enrolments and results.
F3	Enquiries: maintain enquiries.
F4	To-do List: Maintain list of tasks to complete
F5	Accredited courses: maintain accredited course structures and units of competency.

F6	Non-Accredited courses: maintain non- accredited course structures and in-house modules
F7	Training Plans: maintain individual client/enrolment training plans
F8	Client companies: setup and maintain client company information.
F9	Trainers: setup and maintain trainer and assessor information.
F10	Scheduler: calendar-based trainer-scheduling tool.

■ **Table above - PowerPro shortcut keys**

2.4. Mandatory Fields

When entering data into PowerPro, mandatory fields are shown in **red** while optional fields are displayed in **black**. You must enter a value for all mandatory fields to save a record in the database.



3. Creating New Clients

A student, or client, needs to be created in PowerPro before being enrolled in a course. To create a client, from the Home menu, click on the **Clients** button.

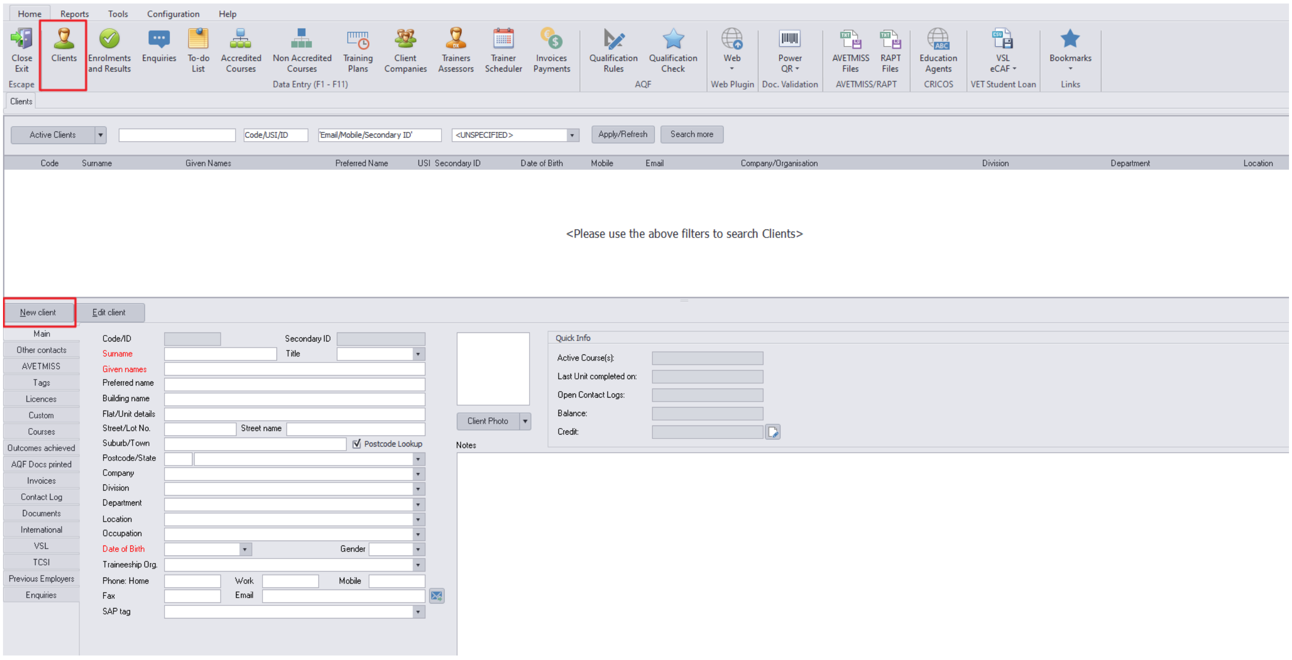


Figure above – Client screen

To create a new client, click on the **New Client** button. The screen will go into Edit mode. Depending on how PowerPro is configured within your RTO there are a number of tabs shown for adding new information. The most common tabs are shown below. Enter all mandatory data in **red**.

Tab	Purpose
Main	Displays the client's name, address, date of birth, contact details and company details. Client notes and a photo of the client are also included. Fields displayed in red are mandatory.
Other Contacts	Displays the clients postal and AVETMISS reporting address as well as emergency contact information.
AVETMISS	Displays Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) information for the client as well as the Surname Override and Given Names Override fields.
Custom	Displays custom client details as set up via the Application Options screen

Table above – Client screen tabs

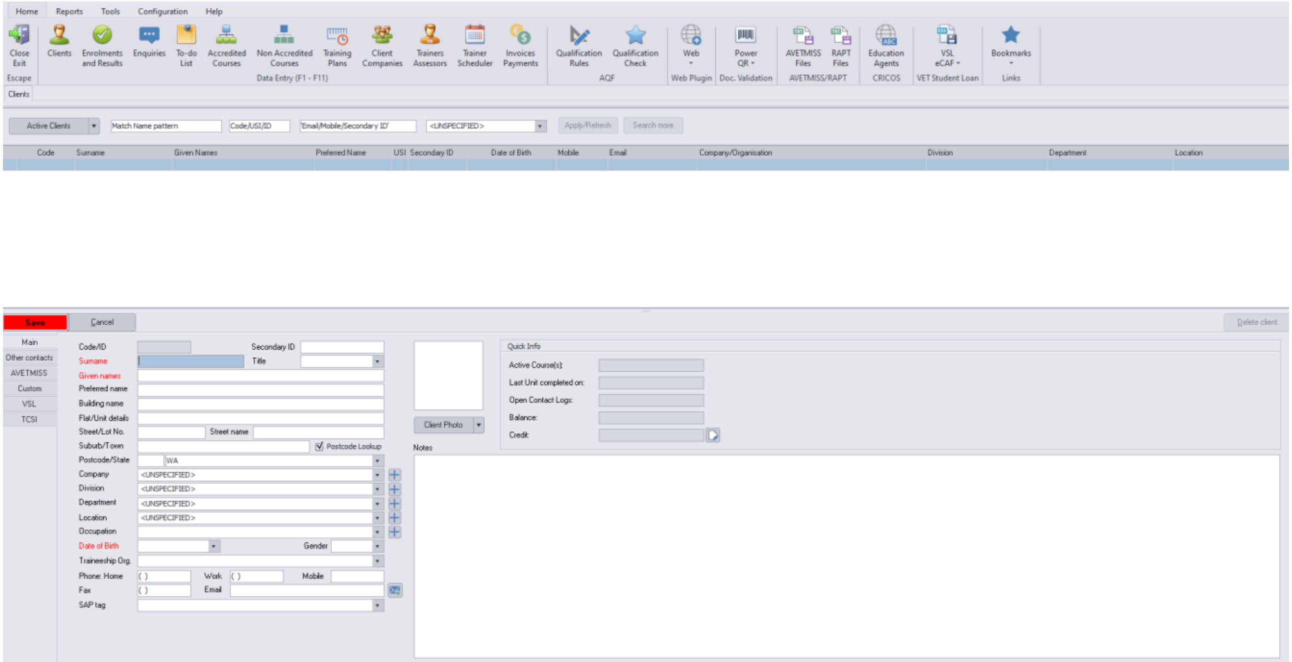


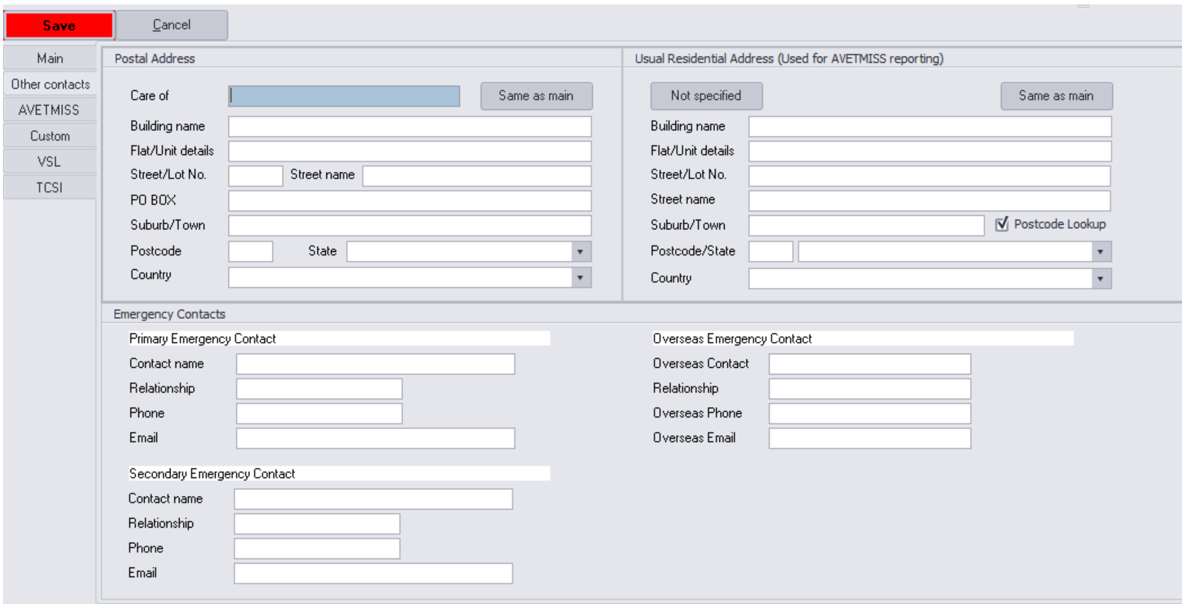
Figure above – Client screen in edit mode

Enter the client's **Surname** and **Given names**. If their names are greater than 25 characters, then it is recommended to shorten the names appropriately and then enter their full name details in the **Surname Override** and/or the **Given Names Override** which is located under the AVETMISS tab.

Enter other known details such as **Client Address**, **Date of Birth**, **Gender**, contact **Phone Numbers** and **Email** address.

Use the **Company** drop down list to attach the client to a company. If the company is not listed, it is possible to add the company 'on-the-fly' by clicking on the blue **'plus'** icon. This will display the **Client Companies** screen where the new company details can be added and saved. The same is the case for the **Division**, **Department**, **Location** and **Occupation** fields.

After all known details are added, click on the **Other contacts** tab.

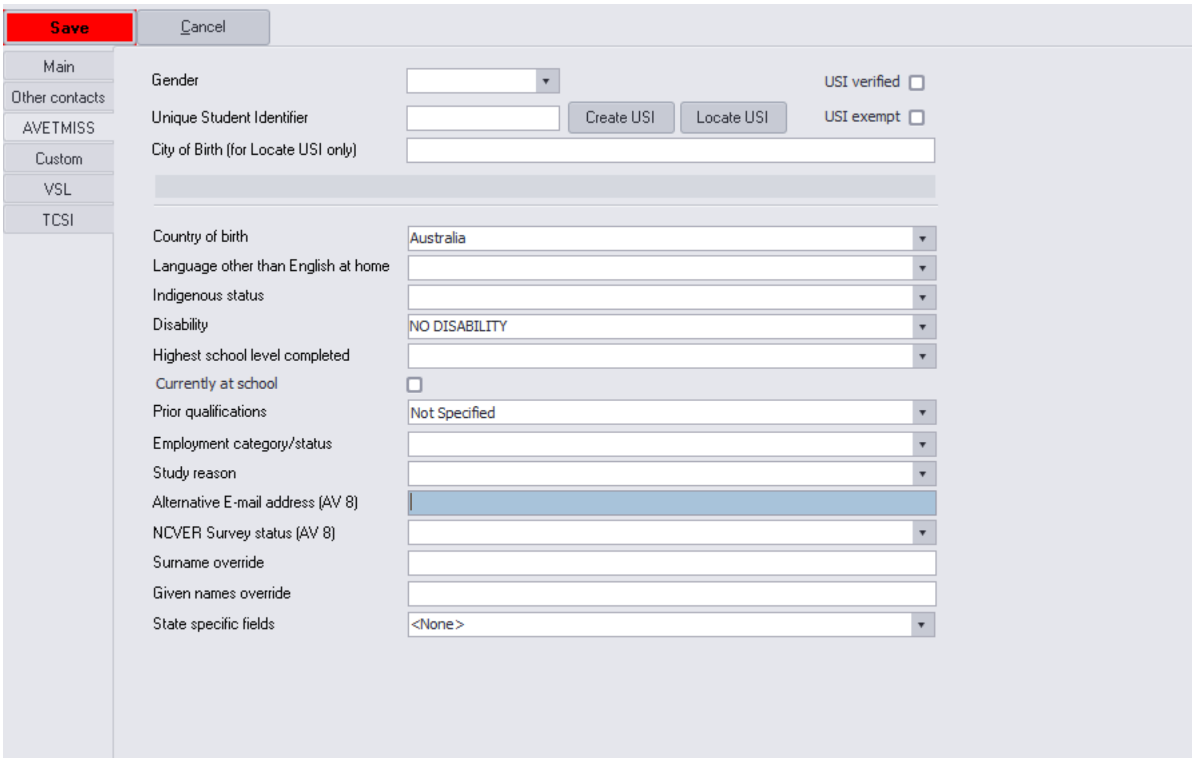


■ **Figure above – Client screen Other Contacts tab**

If the **Postal Address** and **AVETMISS Reporting Address** are the same as the **Main Address**, click on the **Same as Main** button to copy the address details.

Enter the **Primary Emergency Contact**, **Secondary Emergency Contact** and/or **Overseas Emergency Contact** if known.

After all known details are added, click on the **AVETMISS** tab.



■ **Figure above – Client screen AVETMISS tab**

Enter the client's **Gender** and **Unique Student Identifier** (USI), if known, plus any of the other AVETMISS related fields if these details are also known.

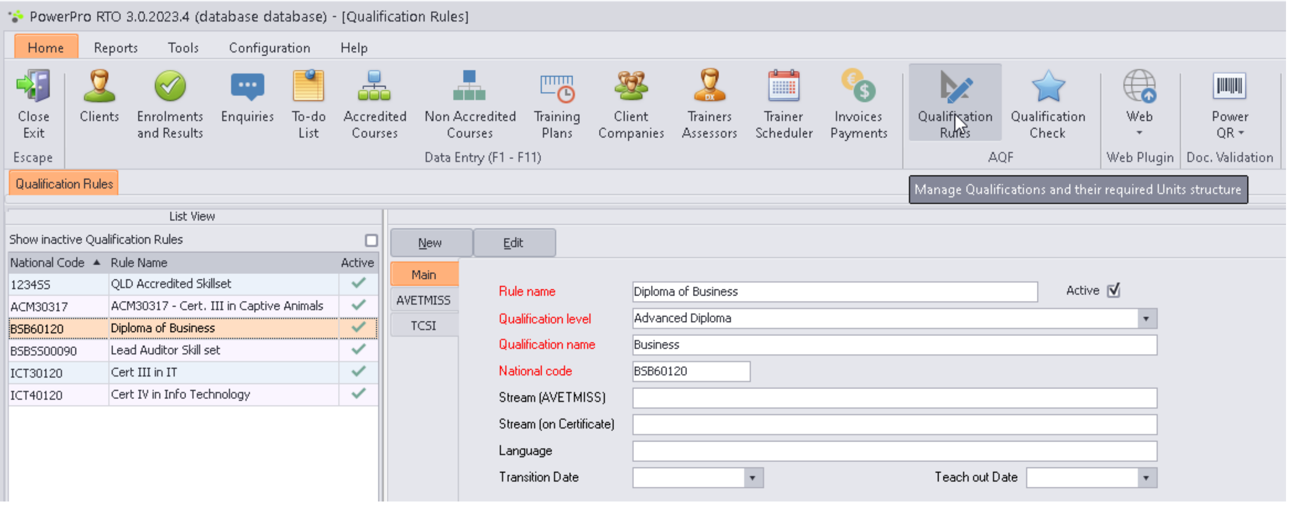
If you need to create a USI on behalf of the client, and you have received the client's permission to do so, then click on the **Create USI** button to open the USI Tool and create a USI. If the client has a USI but they have not included it in registration, then you can attempt to locate it by clicking on the **Locate USI**.

Once all details are entered then click on the **Save** button to create and save the client details.

If further client details are provided at a later time, then click on the **Edit Client** button to edit the client record and add this information.

Note: Clients can also be created on-the-fly when entering an Enrolment in PowerPro (see Adding Client to a Course), imported from Web Enrolments (refer to the Web Plugin Guide) or imported from a Spreadsheet.

4. Qualification Rules



A Qualification Rule is designed as a fail-safe procedure to ensure clients are not issued a qualification where the Training Package packaging rule has not been met. Qualification Rules are used to determine if the client meets the packaging rule. Except for short Courses, all accredited courses in PowerPro must have an active Qualification Rule attached to it, including Skillsets.

It is important that when creating accredited courses, the Qualification Rule is created first. The Qualification Rule can then be applied to the accredited course.

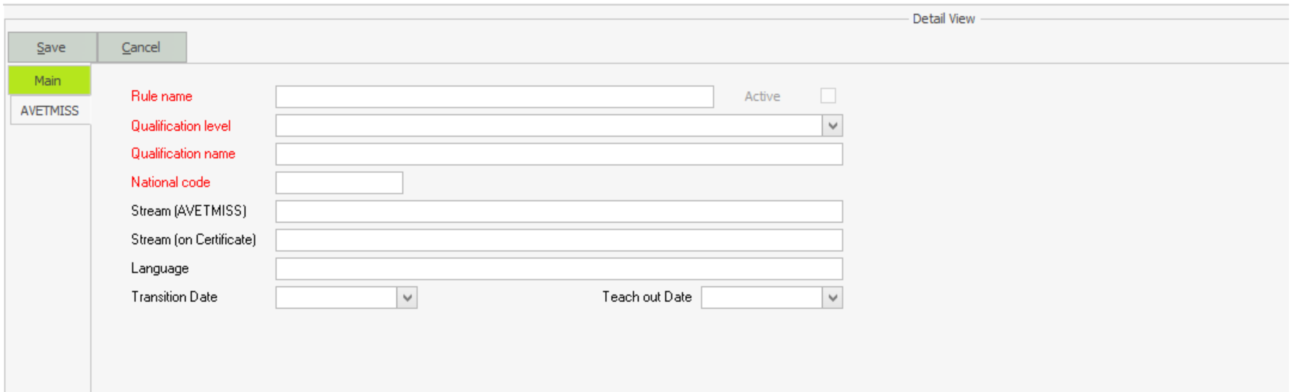
4.1. Creating a New Qualification Rule

To add a new Qualification Rule to the database, click on the **New** button. There are two tabs for adding new information (see below).

Tab	Purpose
Main	Displays qualification rule information including active rule name, qualification level and name, national code, stream, language, transition and teach out dates. Fields written in red are mandatory.
AVETMISS	Displays Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) information for the course.

■ **Table above – Qualification Rule tabs**

The input fields will contain no data. Enter data for all mandatory fields (labelled in **red**) and any other relevant fields.



Enter the **Rule name**. This should be a brief description of what the qualification relates to, for e.g., “Cert IV Info Technology”.

Select the appropriate certification level from the drop-down list in **Qualification level**, for e.g., “Certificate IV”.

Enter the **Qualification name**. This **must** be the same as the qualification name as listed on the Training.gov.au website.

NOTE: You do not need to enter the qualification level in the qualification name field. Doing so will cause a duplication error when printing certificates.

Enter any optional information if required.

Stream (AVETMISS) – enter the Qualification details here where it specialises in a particular area or if the program name does not all fit in the Qualification name. This will be included in AVETMISS reporting.

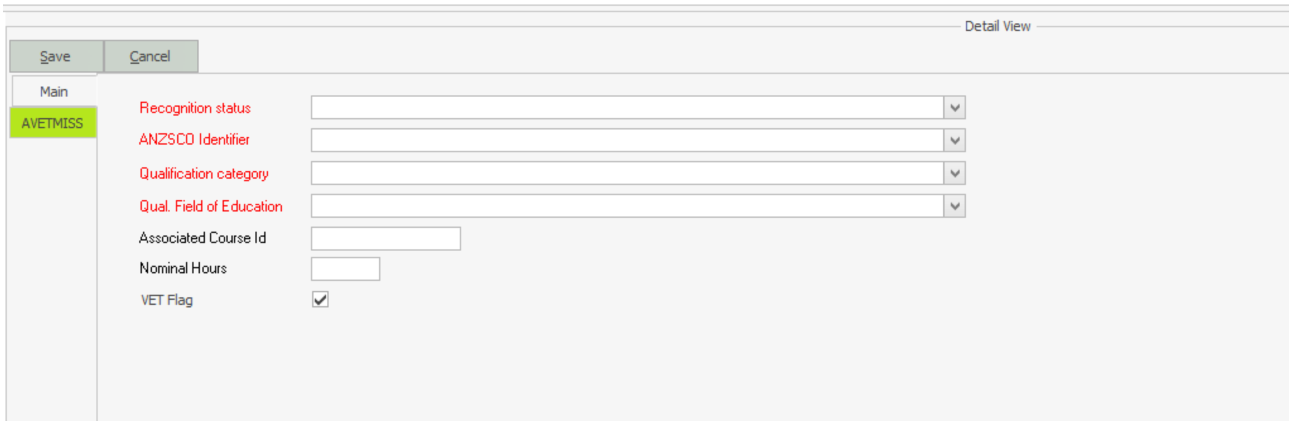
Stream (on Certificate) – enter the Qualification details here where it specialises in a particular area, or if the program name does not all fit in the Qualification name and needs to be printed on the Certificate.

Language – if the Qualification is delivered in a language other than English.

Transition Date – 12 months from the replacement training product is released no new enrolments can be accepted into a superseded qualification.

Teach out Date – the date when continuing clients need to be finalised by.

After all details are added, click on the **AVETMISS** tab.



Select the **Recognition status** from the drop-down list. Depending on what value is selected will depend on whether the other fields on this tab are mandatory or not.

Recognition Status	**Other fields mandatory?**
11 – Nationally accredited qualification specified in a training package	No
12 – Nationally recognised accredited course	No
13 – Nationally accredited skill set specified in a training package	No
14 – Other courses (not nationally recognised)	Yes
15 – Higher-level qualifications (other than codes 11 or 12)	No
16 – Locally recognised skill set	Yes

Table above – Recognition Status vs mandatory information required

If other fields are mandatory, then select the appropriate value from the drop-down list.

On completion of all data entry, click on the **Save** button.

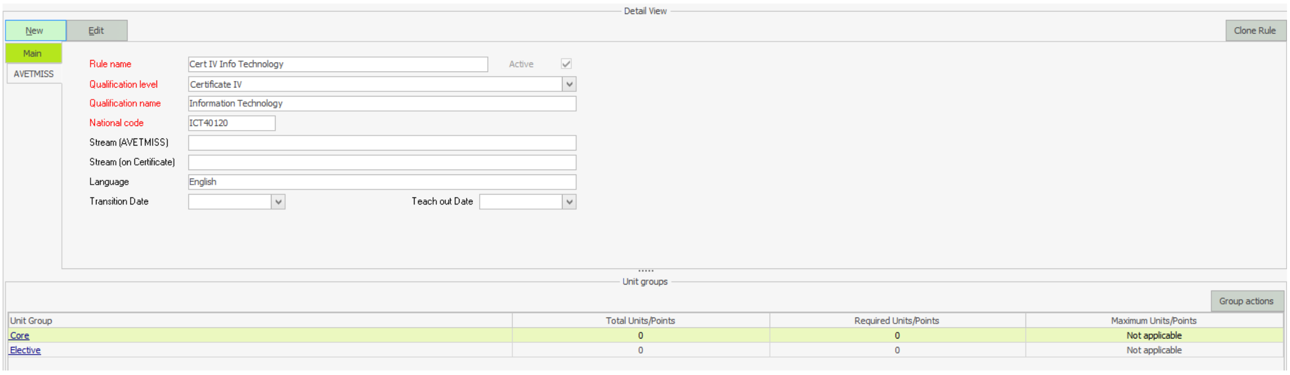
4.2. Adding Qualification Rule Units

Each Qualification has several units that comprise that qualification. All core units and a number of elective units need to be completed to achieve the qualification. Therefore, each Qualification Rule will have several core and elective units to be added (except for some Skillsets). The units to be added will depend on various factors including RTO scope and a trainer's vocational competency to teach that unit.

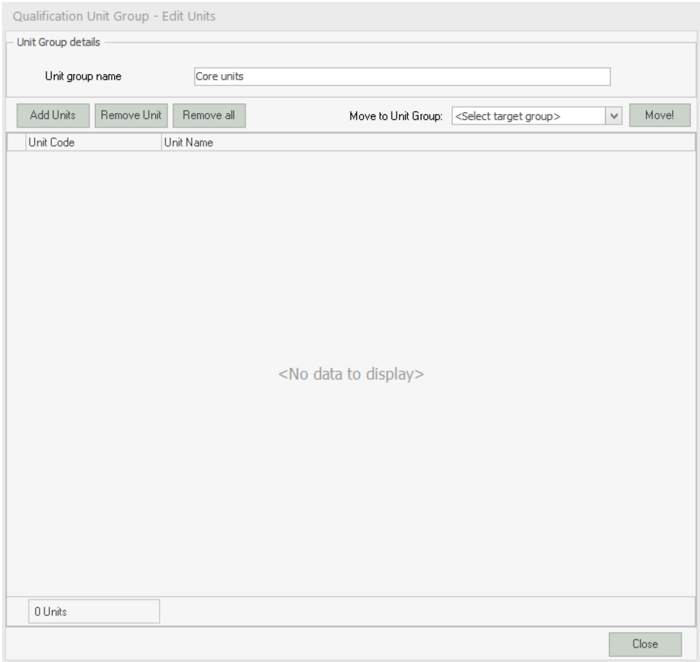
NOTE: A Qualification Rule must be created and saved first BEFORE adding core and/or elective units.

4.2.1. Adding Core Units

To add **Core units** to a Qualification Rule, double click on the Core Unit Group in the Unit Groups section.

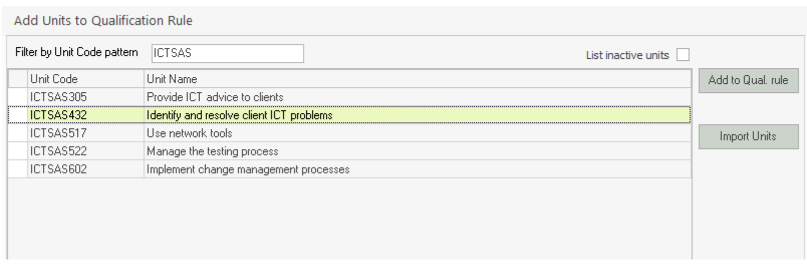


The Qualification Unit group screen will display where from here units can be added.

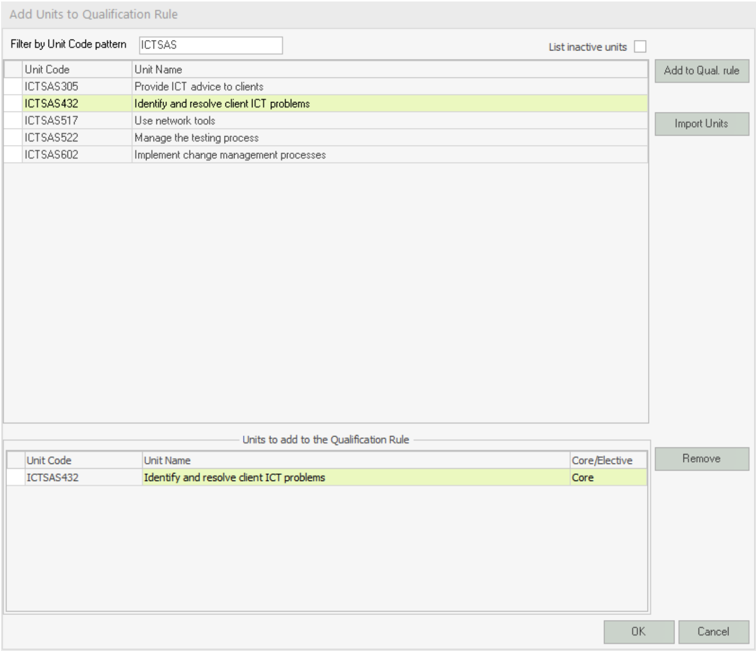


Click on the **Add Units** button to find and select the Core units for the Qualification Rule. Filter the list by entering the unit code into the **Filter by Unit Code pattern** field.

If the unit is not found, you will need to import it. Refer to Importing Units for information on how to import units into the system.



When the unit has been found, highlight it, then click on the **Add to Qual rule** button to add the unit to the Qualification Rule. The unit will then be listed in the **Units to add to the Qualification Rule** section.



When all units have been added click on the **OK** button.

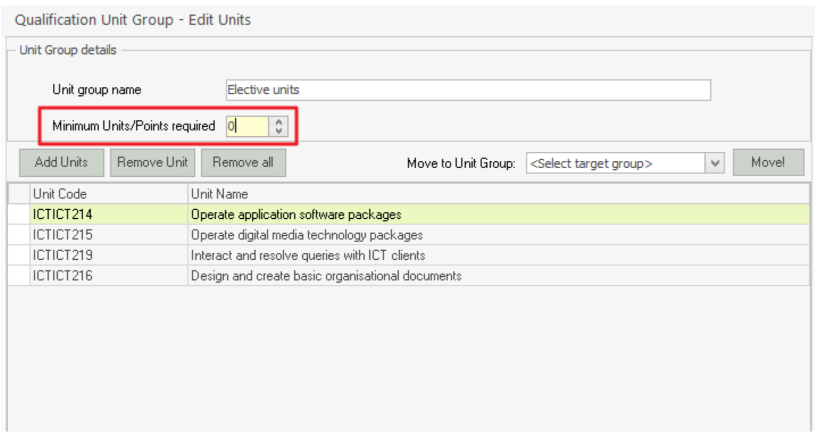
Review the list of units and if complete, click on the **Close** button.

4.2.2. Adding Elective Units

Follow the same process as Core units when adding **Elective** units.

Specific <u>only</u> to elective units, when all elective units have been added, one extra step is required where the **Minimum Units/Points required** must be set.

This is the minimum number of elective units required to achieve the qualification.

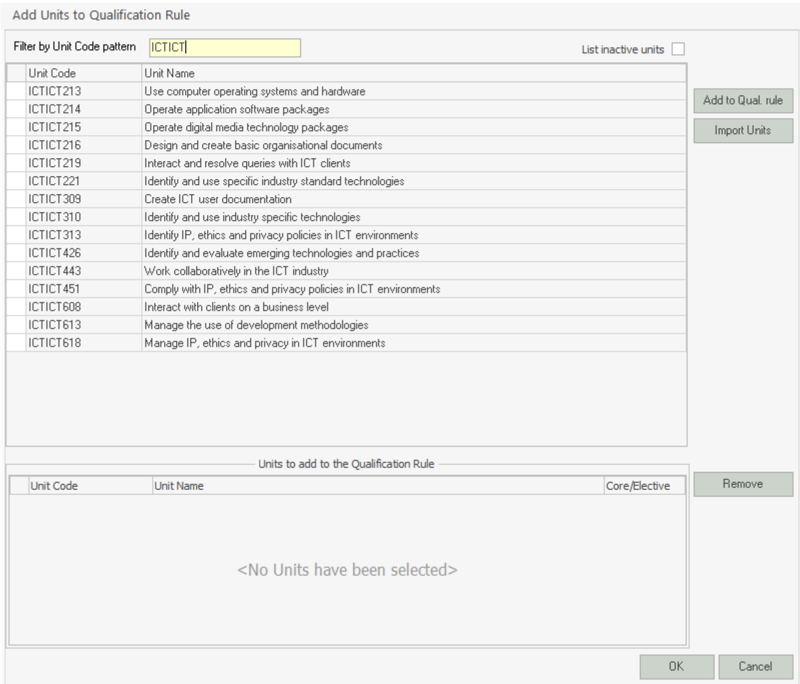


NOTE: If all elective units need to be completed to achieve the qualification, then the **Minimum Units/Points required** <u>must</u> equal the number of units listed!

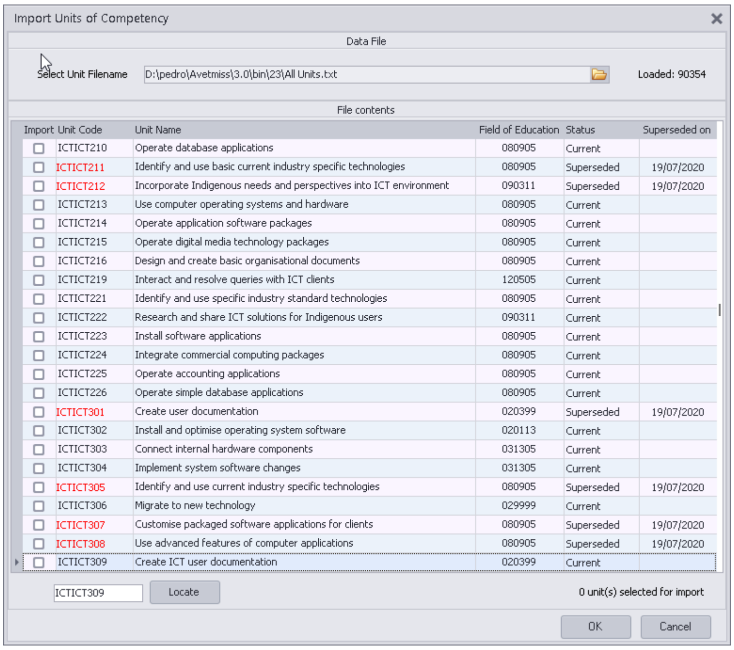
4.2.3. Importing Units

If a core or elective unit is not listed to add to the Qualification Rule, then the unit will need to be imported. PowerPro allows RTOs to import only the units they need relevant to their scope. This enables the RTO to be more efficient as there is no need to scroll through irrelevant units.

To import units, click on the **Import Units** button in the Add Units to Qualification Rule screen.



When the **Import Units of Competency** screen is displayed, enter the unit to be imported in the Locate field in the bottom left corner then click on the **Locate** button. When the unit has been found, check the **Import** check box, then click on the **OK** button. The unit will be both imported into PowerPro and automatically added to the Qualification Rule.



HINT! If multiple units need to be imported, find all units, and check each as you go before clicking on the OK button. The number of units to be imported will be displayed in the bottom right corner.

4.3. Editing an Existing Qualification Rule

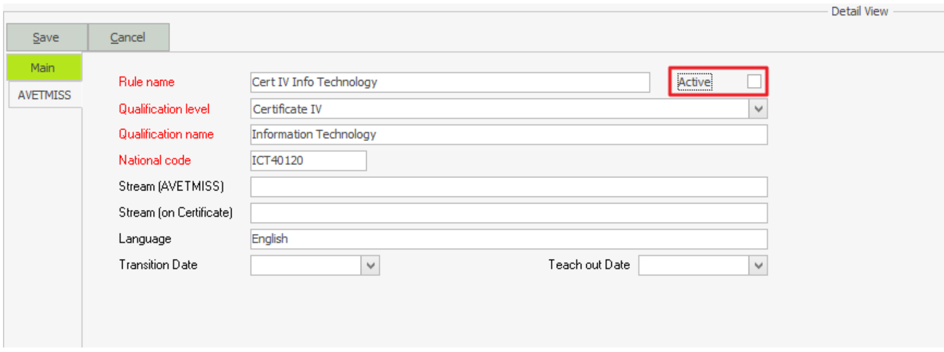
An existing Qualification Rule may require editing for several reasons. Where editing is required, find, and highlight the Qualification Rule and click on Edit to add, modify, or delete information. Click on the **Save** when completed to save the changes or the **Cancel** button to exit without saving.

If only units need to be added or removed from the Qualification Rule, there is no need to edit the record. Follow the steps as outlined in Chapters 4.1.2 – 4.1.5.

4.4. Deactivating a Qualification Rule

Over time a Qualification Rule may be superseded and is no longer required. A Qualification Rule cannot be deleted, however it can be made Inactive.

To make a Qualification Rule inactive, click on the **Edit** button and uncheck the **Active** check box. On completion click on the Save button.


Detail View
Save
Cancel
Main
AVETMISS
Rule name
Cert IV Info Technology
Active
Qualification level
Certificate IV
Qualification name
Information Technology
National code
ICT40120
Stream (AVETMISS)
Stream (on Certificate)
Language
English
Transition Date
Teach out Date

5. Master Courses

Master Courses are course templates from which to clone, or copy, from. The idea behind this concept is to ensure consistency when creating Courses.

Master Courses can be created for both accredited and non-accredited courses as well as full qualification and short-courses. RTOs are encouraged to create Master Courses for all Courses that the RTO offers.

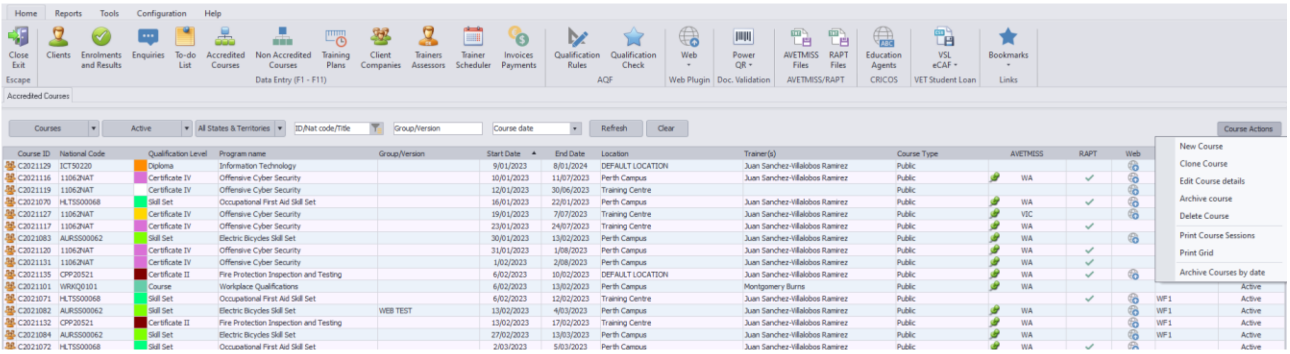
Master Courses do not take enrolments, are not reportable and will not display on Web Enrolment lists (where RTOs use PowerPro's Web Plug In feature – refer to our website for more information).

Master Courses are configured in the Accredited Courses/Non-Accredited Courses window and are omitted from the Enrolments and Results window.

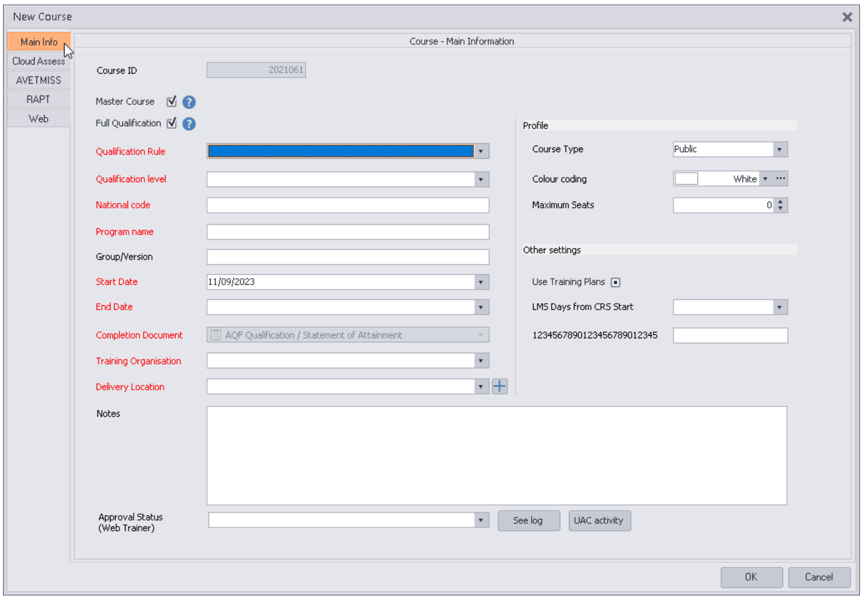
5.1. Creating a New Master Course

Open the Accredited Courses screen.

To create a new Master Course, click the **Course Actions** button and select **New Course** from the drop-down menu.



The **New Course** screen will open. By default, the Master Course and Full Qualification checkbox will be ticked.



The New Course screen contains several tabs for adding specific course information.

Tab	Purpose
Main info	Displays general course information including course ID, qualification/level, name, version, dates, and training organisation. Fields written in red are mandatory.
Cloud Assess/Moodle	Cloud Assess/Moodle integration fields
AVETMISS	Displays Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) information for the course.
RAPT	Displays Resource Allocation Program for Training (RAPT) identification code for the course. For selected WA RTOs only.
Web	Displays web publishing options

Table above - Accredited course tabs and their purpose

The **Main Info** tab will be displayed as the default tab. The input fields will contain no data. All fields labelled in **red** are mandatory.

The **Course ID** field will appear grey and cannot be altered as PowerPro will automatically assign a Course ID.

Below the **Course ID** field and **Master Course** check box is the **Full Qualification** check box. If the course does not offer a qualification (Short Courses), uncheck this check box. The Qualification Rule field will automatically disappear, and the **Qualification Level** field below will appear grey and contain the word 'Course'.

If the course offers a qualification and an appropriate Qualification Rule has been created (see Chapter 4), then select the Rule from the drop-down list. Selecting the Qualification Rule will automatically pre-fill the **Qualification level**, **National code,** and **Program name**.

The **National Code** field can be left blank if there is no qualification (Short Courses).

For Master Courses the **Group/Version** field should be left blank and only filled in when cloning the course.

The course **Start Date** will default to today's date. Select the course's **Start Date** and **End Date** from the dropdown calendars reflecting the typical Course duration of this Course.

NOTE: The *Start Date* and *End Date* of a Master Course are to denote the <u>length of time</u> the course will take to complete. The actual dates are irrelevant.

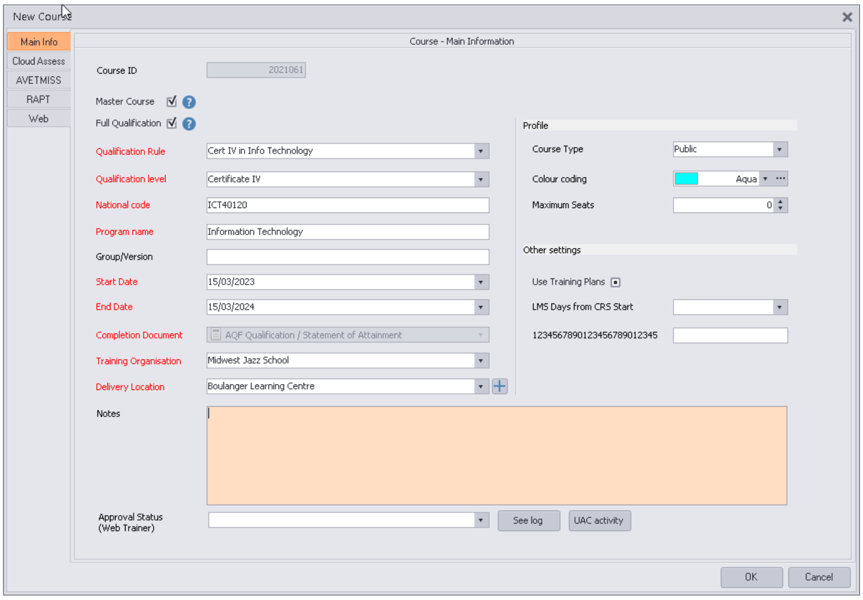
The **Completion Document** field will be greyed out where the course is marked as a Full Qualification. The document will automatically default to "AQF Qualification / Statement of Attainment". This cannot be edited.

Where the course is not a Full Qualification, select the appropriate completion document from the dropdown list.

Use the **Training Organisation** dropdown field to, select the Training Organisation.

Use the **Delivery Location** field to specify the default training venue for this Course. If the Delivery Location is not listed, a new location can be added by clicking on the blue '**cross**' icon to the right of the field. This opens the Delivery Location details window and contains the necessary fields for inputting new delivery location information. Enter the mandatory fields and click **OK** to save the information or **Cancel** to abandon the changes and return to the previous window.

An example course with appropriate data entered is shown below:



■ **Figure above - New Course screen**

Other fields to be considered and updated, if necessary, include:

Colour Coding – select a colour to differentiate courses in the Enrolment and Results screen.

Maximum Seats – the maximum number of clients per course. Zero indicates that an unlimited number of clients can attend the course.

Use Training Plans – tick this checkbox if your Training Plans are applicable to this Course.

Select the **AVETMISS** tab to enter relevant Australian Vocational Education and Training Management Information Statistical Standard data for this course.

Select the **RAPT** tab (for selected WA RTOs only) to enter the Resource Allocation Program for Training data for this course. You can enter the CPD ID into the blank field and specify whether the course is an apprenticeship/traineeship.

Once you have finished entering data for the new course, click the **Save** button. A new Master Course will be created in the database.

The Accredited Courses screen will then automatically refresh and show the newly created Master Course in the Master Courses tab. To return to the Accredited Course list, click on the Master Course button and select Courses.

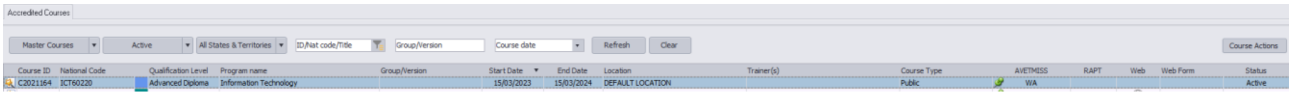


Figure above – Accredited Courses screen with Master Courses tab selected

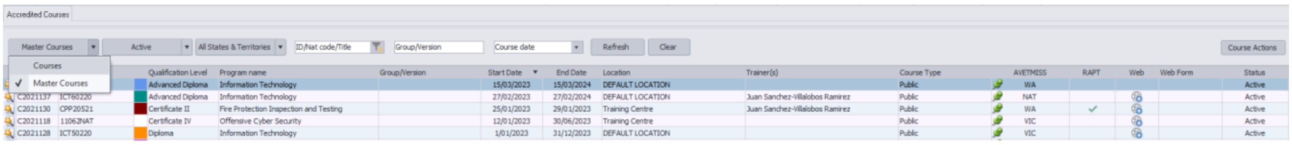
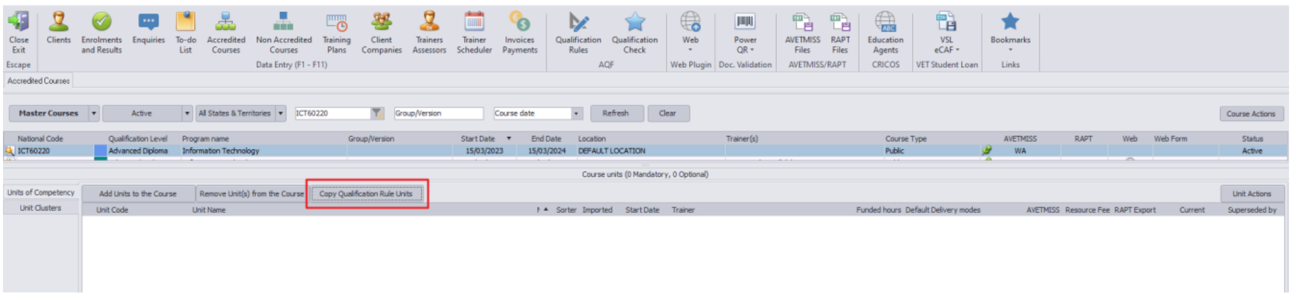


Figure above – Accredited Courses screen with Courses Type tab options displayed

5.2. Copying Qualification Rule Units

Once the Master Course has been created, the course units need to be added to the course.

To do this from the **Accredited Course** screen find and highlight the Master Course. Then click on the **Copy Qualification Rule Units** button.



The Import Qualification Rule Units screen will be displayed where units can be reviewed and confirmed ready to be added to the Master Course.

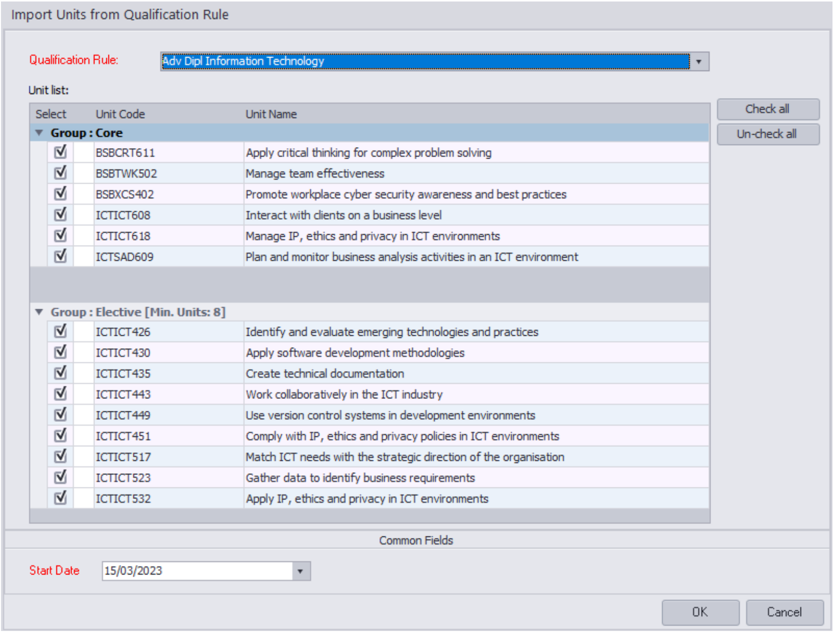


Figure above – Import Units from Qualification Rule screen

Click on the OK button to add the units to the Master Course.

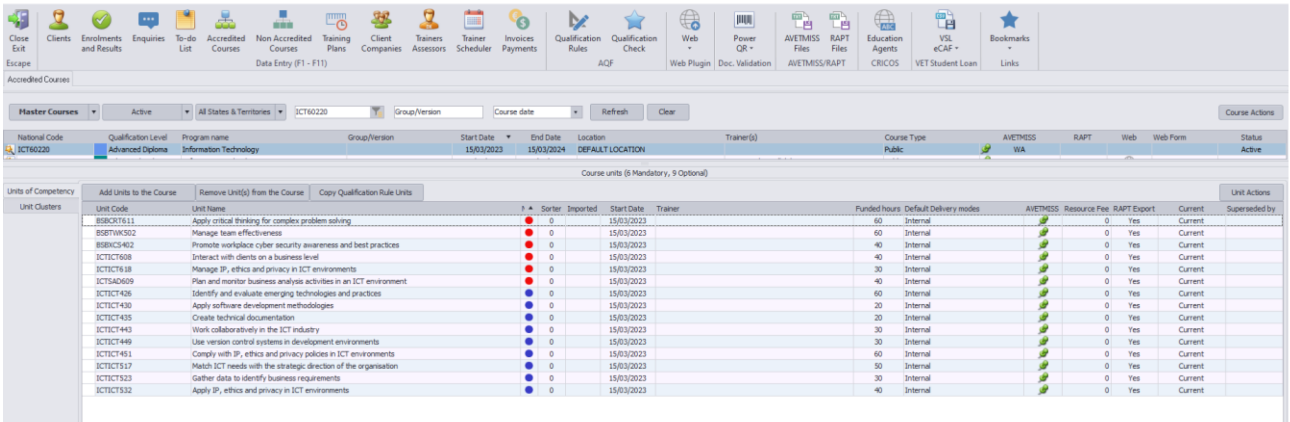


Figure above –Qualification Rule units shown added to the Master Course

5.3. Editing a Master Course

To view/modify course attributes just double-click on the relevant course in the course list panel. This will open the **Course details** window with the following tabs.

Tab	**Purpose**
Main info	Displays general course information including course ID, qualification/level, name, version, dates, and training organisation. Fields written in red are mandatory.
Workflow	Displays course stages and tasks structure for this course.

Scheduled Sessions	Displays date, day, time, location, trainer, and unit(s) studied.
Attendance	Displays and allows editing the student attendance for the course.
Trainers/Resources	Displays trainers and resources used for the course.
Docs	Displays a list of any documents attached to this course. Good document candidates are student and trainer signed class roles - do NOT use this to store course material/content documents
Invoicing	Displays invoicing information, including by course or unit, GST option and total fee (exclusive of GST).
Company invoices	Displays invoice and payment details (Not applicable to Master Courses)
Units	Displays units in the course.
AVETMISS	Displays Australian Vocational Education and Training Management Information Statistical Standard information (AVETMISS) for the course.
RAPT	Displays Resource Allocation Program for Training (RAPT) identification code for the course.
WEB	Information about if and how the course is to be displayed online.

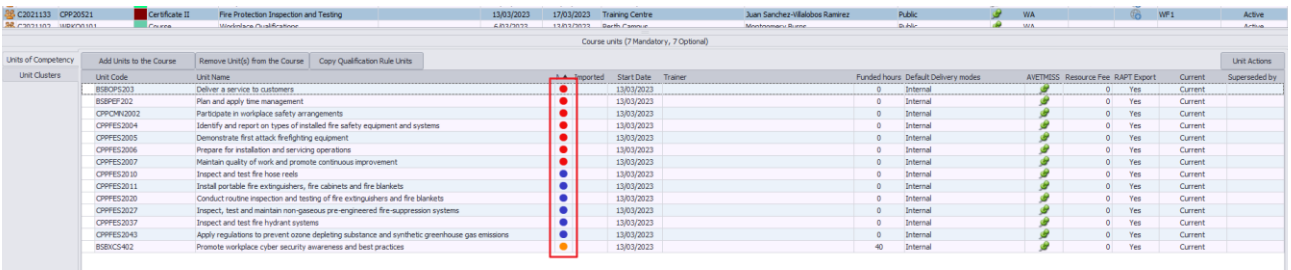
Table above - course tabs

The screen will open on the **Main Info** tab by default. Refer to the previous chapter on making modifications to this information in this tab.

Select the **Workflow** tab to view and make changes to the course workflow. More information on workflow can be found in the Workflow Guide located in PowerPro via >Help >User Guides >Workflow Guide.

Select the **Scheduled Sessions** tab to view and edit course session details. Here you can click **New Session** to create an extra session. You can input and edit relevant information in the **Trainer**, **Course**, **Units**, **Location** and **Caption** fields, and specify start and finish times for the session.

To view units in the course, select **Units** tab. This will display unit codes, names, and dates. A red circle signifies a mandatory unit; a blue circle denotes an optional unit. An orange circle means that the unit is not included in the Qualification Rule (refer to Adding Qualification Rule Units on how to add a unit to a Qualification).

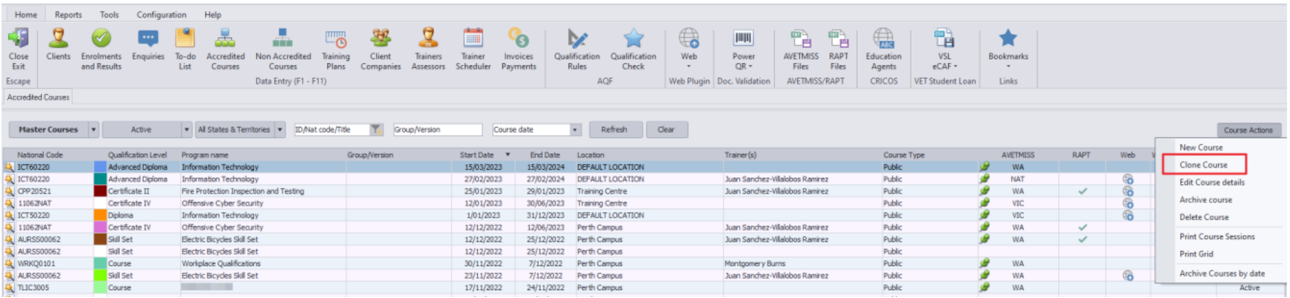


6. Cloning Courses

After creating a Master Course, the next step is to clone the course. This means taking an exact copy of the Master Course which can then be used to enrol clients into.

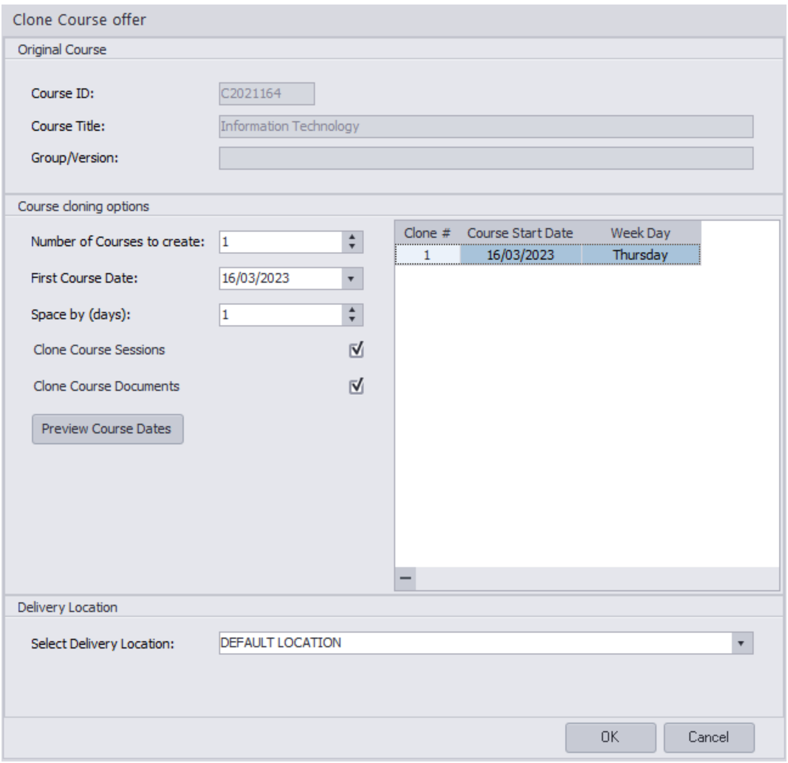
To clone a course, first open the Accredited Courses window and set the **Filter Course** dropdown to **Master Courses**.

Highlight the Master Course to be cloned and click on the **Course actions** dropdown button (top right of the window) and select **Clone course**.



■ **Figure above – Clone Course from Course Actions dropdown**

The **Clone Course offer** window is displayed.



■ **Figure above - Clone Course offer input window**

The Clone Course offer screen allows cloning of multiple courses at once. By default, the number of courses is set to one (1).

Number of Courses to create allows a multiple of courses to be created at once.

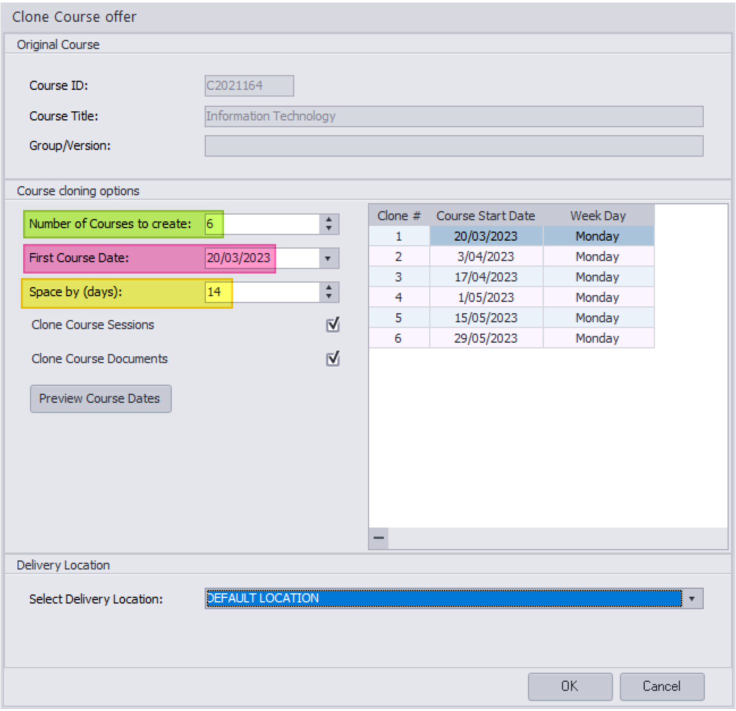
First Course Date is the start date of the first course.

Space by Days allows the time between course start dates to be entered. For example, if you wish to run courses every two weeks then the Space by Days should be set to 14, every month 30 etc.

The **Preview Course Dates** button will show a list of the number of clones, the start date, and the day of the week the course commences.

The appropriate training location can be set via **Set Delivery Location**.

For example, if it is known that six courses need to be created every two weeks starting on a Monday the Clone Course offer screen would look like below:



IMPORTANT NOTE: Once a course has been cloned, that course becomes independent of the Master Course. IF you make a change to a Master Course AFTER a course has been cloned, the changes to the Master Course DO NOT automatically propagate to those cloned course(s). You will need to update the cloned course(s) manually.

---

7. Course Units

The course units table lists the units made available to students enrolling in the selected course. The units are colour coded with a red circle to denote a mandatory unit, a blue circle to indicate an optional unit and an orange circle to denote that the unit is not part of the qualification rule.

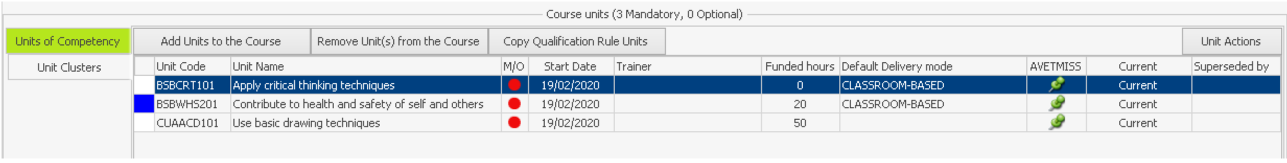
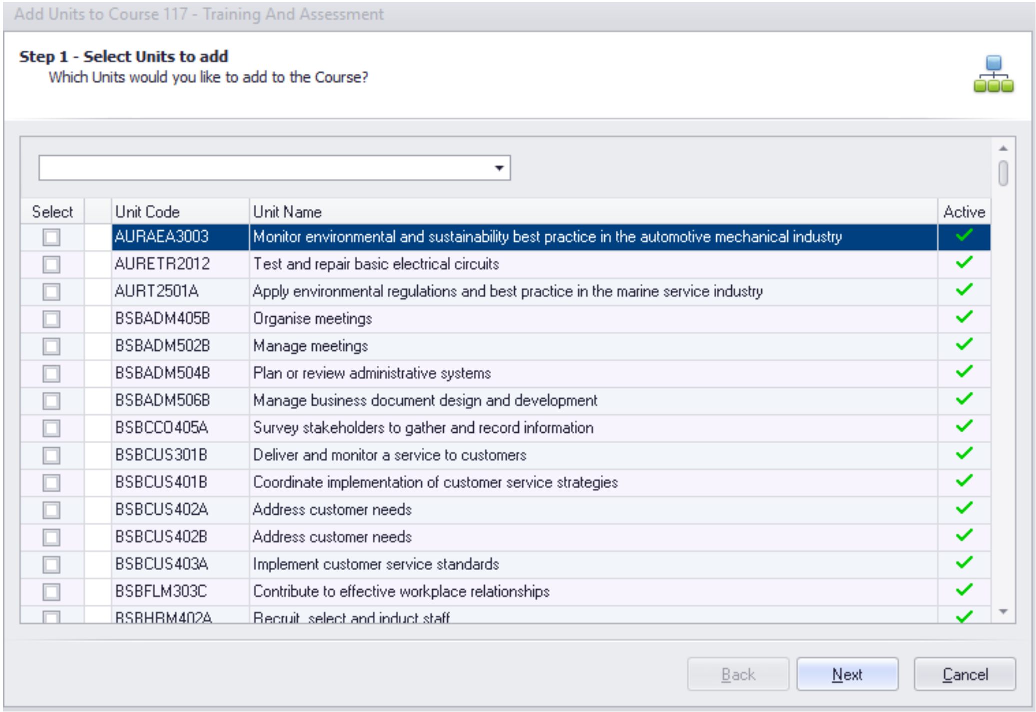
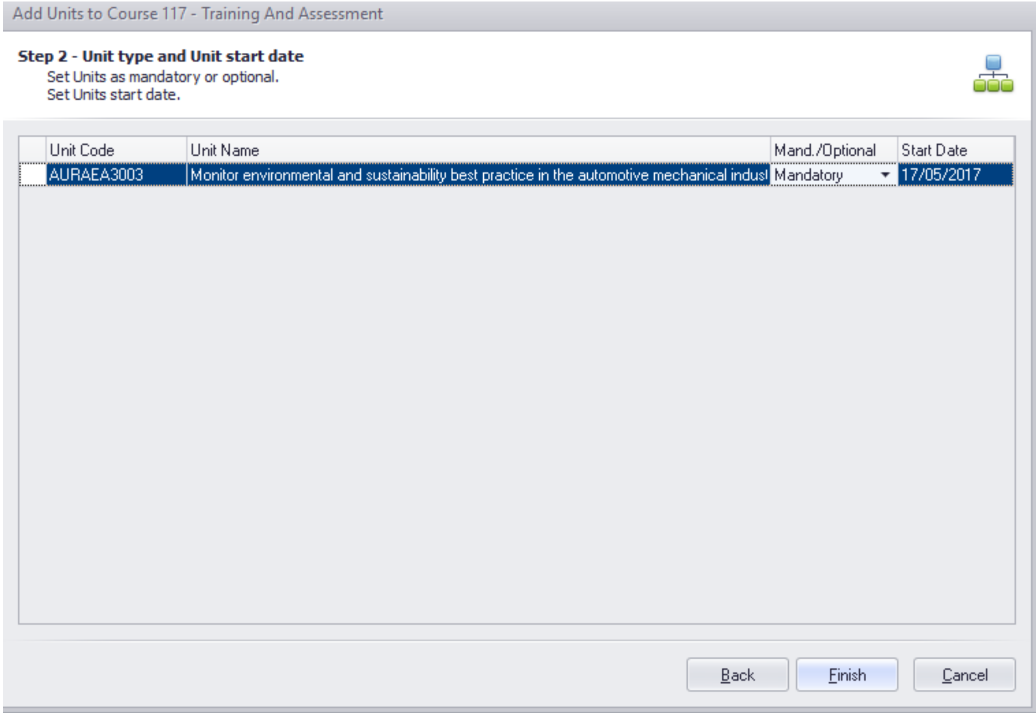


Figure above - Course Units of Competency panel

To add more units to the **Course**, click the **Add Units to the Course** button:



Select the unit(s) you wish to add to the course.



Select whether the unit is mandatory or optional by using the drop-down box provided. Once completed, click **Finish.**

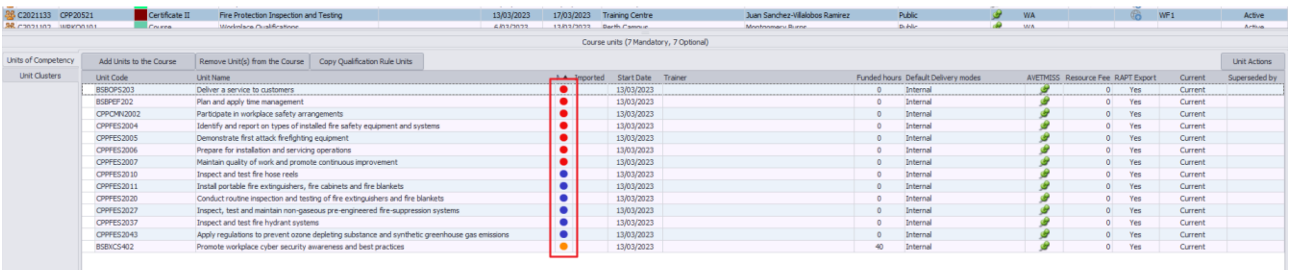
To delete units from the **Course units** list, select the course and click Remove Unit from the Course.

Click the **Copy Qual Rule Units** button to restructure a course by copying units associated with an existing qualification rule.

7.1. Units Marked Orange

A unit with an orange circle denotes that it is not part of the Qualification Rule.

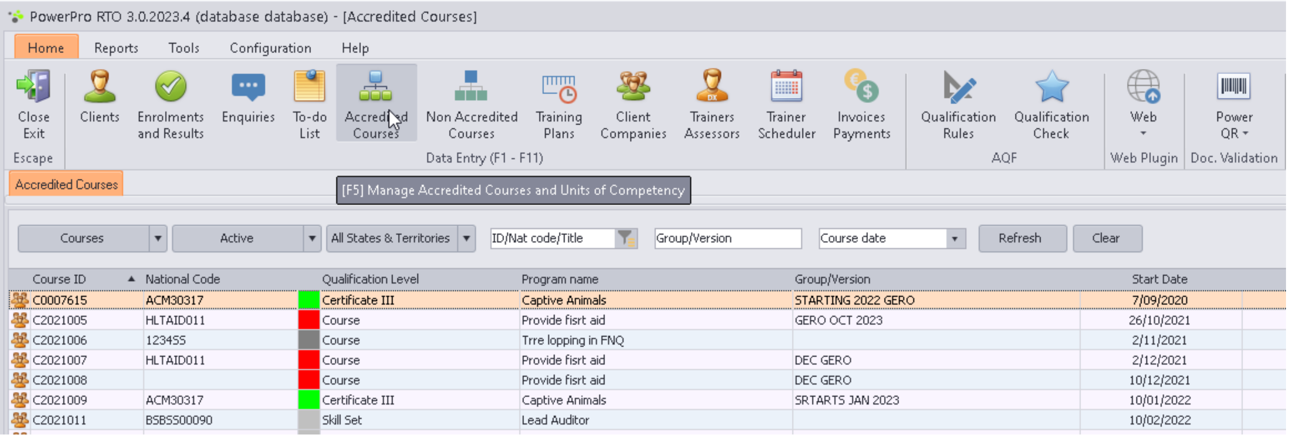
This can occur when a unit is added to the Accredited Course but has NOT been added to the Qualification Rule. If a unit shows as orange, it will not be included in any certificates printed for clients.



If a unit is showing as orange and it is expected to be showing as either red or blue, then the unit needs to be added to the Qualification Rule (refer to Adding Qualification Rule Units on how to add a unit to a

Qualification). After adding the unit to the Qualification Rule ensure to refresh the Accredited Courses and/or the Enrolment and Results screen to see the changes.

8. Accredited Courses



Use the **Accredited Courses** window to create/modify/clone any courses based on units of competency. These courses can either be AQTF qualifications, licensing courses (e.g., First Aid, RSA) or accredited courses (any of those with a National code such as 1234QLD). From the **Accredited Courses** screen, you can also manage the mandatory and optional units in a course, maintain the list of units in the system and view/modify unit details.

The **Accredited Courses** screen displays:

- A list of master courses
- A list of courses (active / archived courses)
- A list of the course units (for the selected course)

The course list panel appears at the top of the screen, just below the main menu (red highlight), while the course units shown for the selected course are further down (green highlight).

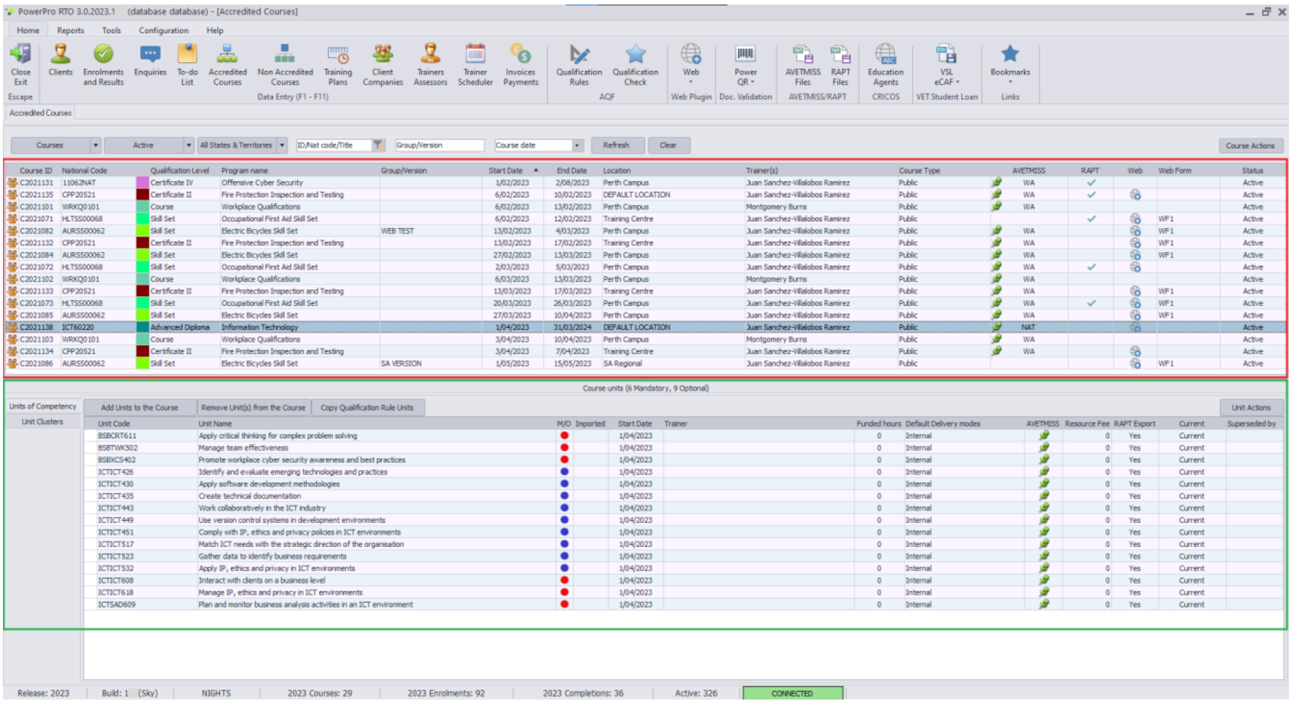


Figure above The Accredited courses screen

When a course is selected it is possible to add units to the course (deleting a course units is disallowed if there is a result entered for that unit in the course). You can do this by clicking on the “Add Units to the Course” or “Remove Units from the Course” button.

To view different course lists, click on the **List Courses** dropdown menu (second from left), and click on **Active courses**, **Archived courses**, or **Active & Archived** to display desired courses.

You can also enter data in the fields on the top line of the Accredited Courses panel to filter courses accordingly.

8.1. Adding a New Accredited Course

Adding a new Course manually is discouraged. The recommended procedure is to clone the Master Course – refer to the Cloning Courses chapter. Should you still want to create the new course manually, please follow these instructions:

To add a new course to the database, click the **New Course** button to open a **Course details** window which contains several tabs (see below) for adding new course information.

Tab	Purpose
Main info	Displays general course information including course ID, qualification/level, name, version, dates, and training organisation. Fields written in red are mandatory.
Cloud Assess/Moodle	Cloud Assess /Moodle specific integration fields
AVETMISS	Displays Australian Vocational Education and Training Management Information Statistical Standard (AVETMISS) information for the course.
RAPT	Displays Resource Allocation Program for Training (RAPT) identification code for the course.
Web	Displays web publishing options

Table above - Accredited course tabs

To begin adding a new course to the database, select the **Main Info** tab. The input fields will contain no data.

The **Course ID** field will appear grey and cannot be altered because the computer will automatically assign a Course ID.

NOTE: Uncheck the “Master Course” field. Creating a Master Course is covered in Chapter 5.

Below the **Master Course** check box is the **Qualification** check box. By default, the Qualification check box is ticked. If the course does not offer a qualification, uncheck the **Full Qualification** check box. The Qualification Rule field will automatically disappear, and the **Qualification Level** field below will appear grey and contain the word ‘Course’.

If the course offers a qualification and an appropriate Qualification Rule has been created (see Chapter 3), then select the Rule from the drop-down list. Selecting the Qualification Rule will automatically pre-fill the **Qualification level**, **National code,** and **Program name**.

Enter data for all other mandatory fields (labelled in **red**) and any other relevant fields.

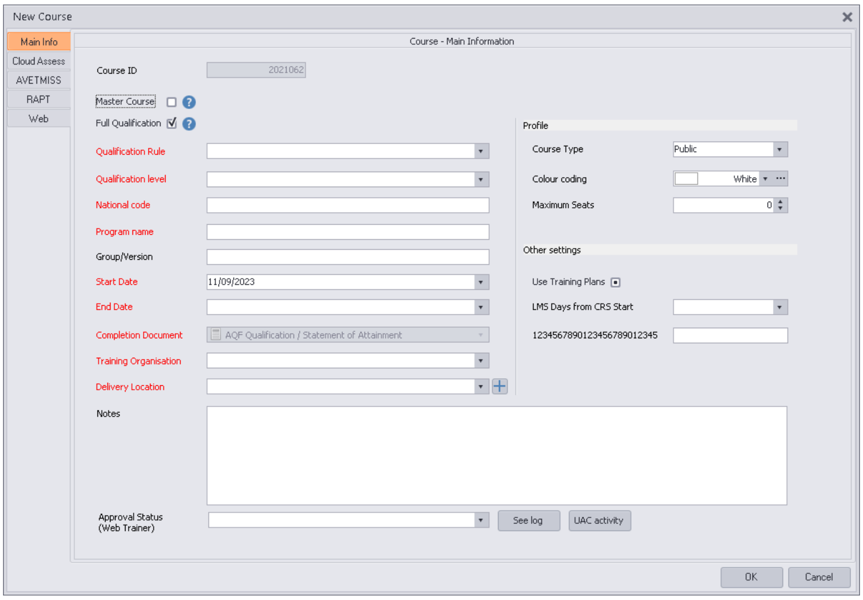


Figure above - The New Course screen

In the **National Code** field, enter the appropriate national code for the qualification selected above. This can be left blank if there is no qualification.

Enter the course version in the **Version** field.

Select the course's **Start Date** and **End Date** from the dropdown calendars.

In the **Completion Document** field, to enter a completion document for a course with no qualification, select the appropriate document from the dropdown list. If the course has a qualification, a completion document will be automatically assigned when you selected a particular qualification. This cannot be edited.

To choose a training organisation in the **Training Organisation** field, click the dropdown list and select the desired organisation.

Use the **Delivery Location** field to specify the course's location. If the Delivery Location is not listed, a new location can be added by clicking on the blue **plus** icon to the right of the field. This opens the delivery Location details window and contains the necessary fields for inputting new delivery location information. Enter the mandatory fields and click **OK** to save the information or **Cancel** to abandon the changes and return to the previous window.

Select the **AVETMISS** tab to enter relevant Australian Vocational Education and Training Management Information Statistical Standard data for this course.

Select the **RAPT** tab (for selected WA RTOs only) to enter the Resource Allocation Program for Training data for this course. You can enter the CPD ID into the blank field and specify whether the course is an apprenticeship/traineeship.

Once you have finished entering data for the new course, click the **Save** button. A new course record will be created in the database.

To view course lists, click on the **List Courses** dropdown menu, and click on **Active courses**, **Archived courses**, or **Both** to display desired courses.

You can also enter **Pattern Match** and **Version** data in the fields on the top line of the unit-based courses panel.

8.2. Editing an Existing Course

To view/modify course attributes just double-click on the relevant course in the course list panel. This will open the **Course details** window with the following tabs.

Tab	Purpose
Main info	Displays general course information including course ID, qualification/level, name, version, dates, and training organisation. Fields written in red are mandatory.
Workflow	Displays course stages and tasks structure for this course.
Scheduled Sessions	Displays date, day, time, location, trainer, and unit(s) studied.
Attendance	Displays and allows editing the student attendance for the course.
Trainers/Resources	Displays trainers and resources used for the course.
Docs	Displays a list of any documents attached to this course. Good document candidates are student and trainer signed class roles - do NOT use this to store course material/content documents
Invoicing	Displays invoicing information, including by course or unit, GST option and total fee (exclusive of GST).
Company invoices	Displays invoice and payment details.
Units	Displays units in the course.
AVETMISS	Displays Australian Vocational Education and Training Management Information Statistical Standard information (AVETMISS) for the course.
RAPT	Displays Resource Allocation Program for Training (RAPT) identification code for the course.
WEB	Information about if and how the course is to be displayed online.

■ **Table above - course tabs**

Select the **Scheduled Sessions** tab to view and edit course session details. Here you can click **New Session** to create an extra session. You can input and edit relevant information in the **Trainer**, **Course**, **Units**, **Location** and **Caption** fields, and specify start and finish times for the session. Shceduled sessions are particularly important when tracking student attendance.

Select the **Company Invoices** tab to manage the creation or payment of any invoices for this course.

To view units in the course, select **Units** tab. This will display unit codes, names, and dates. A red circle signifies a mandatory unit; a blue circle denotes an optional unit.

8.3. Deleting an Existing Accredited Course

Click the **Delete Course** button to remove a course.

A **Confirm action** dialogue box will appear to delete the course from the database.

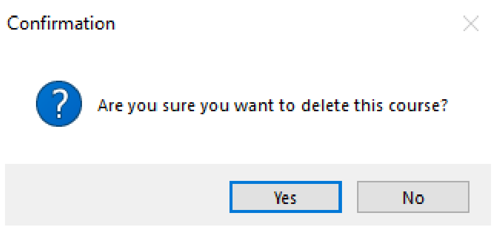


Figure above - Confirm action dialog box

If you currently have clients enrolled into a course, you will not be able to delete the course. An error message will display if this is the case.

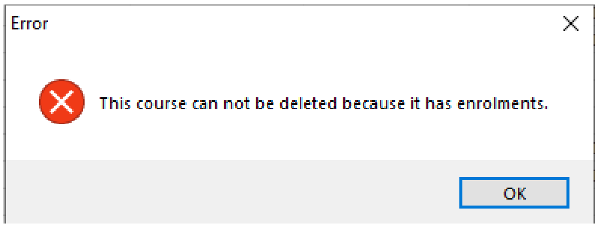
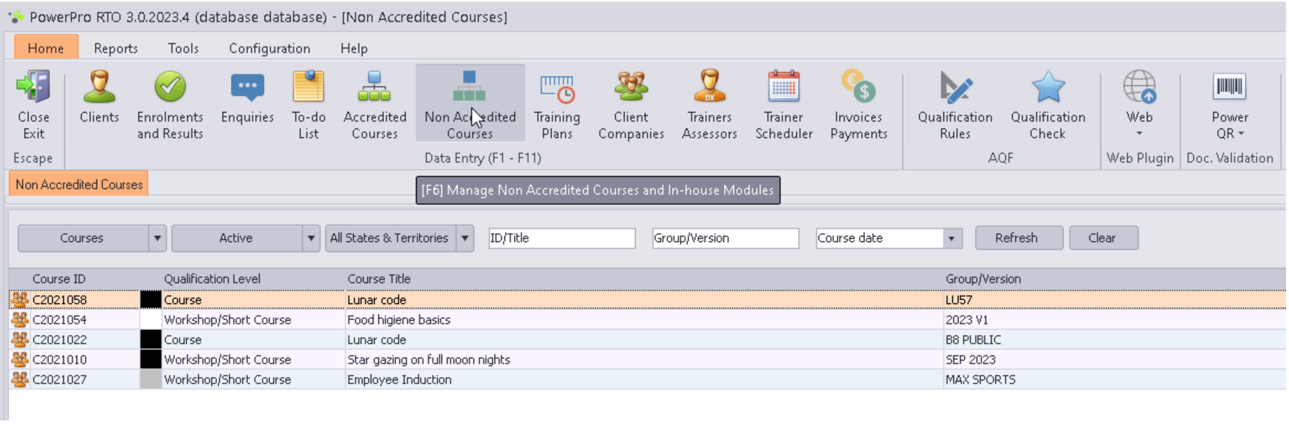


Figure above - Error dialog box

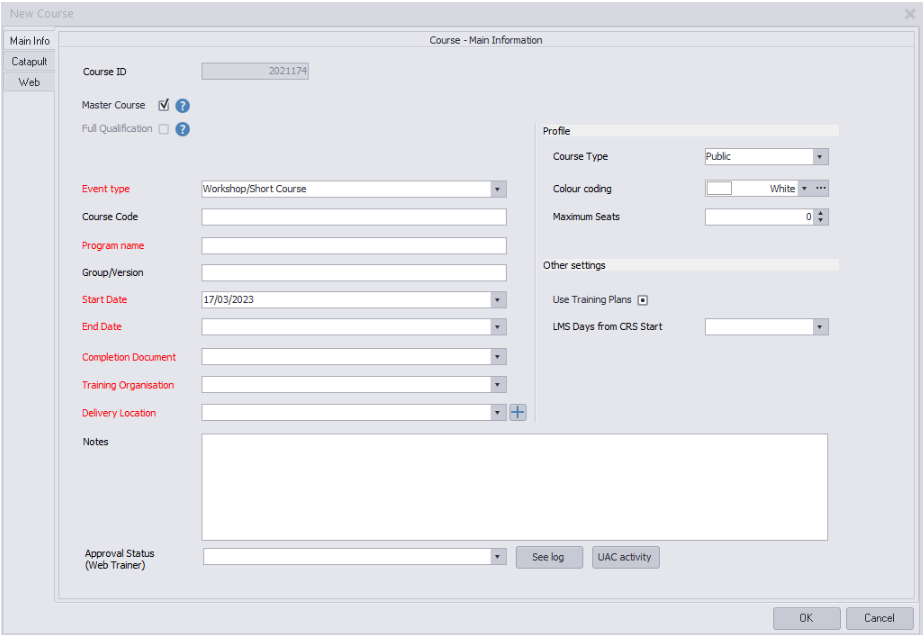
All enrolments will need to be transferred or deleted before a course can be deleted.

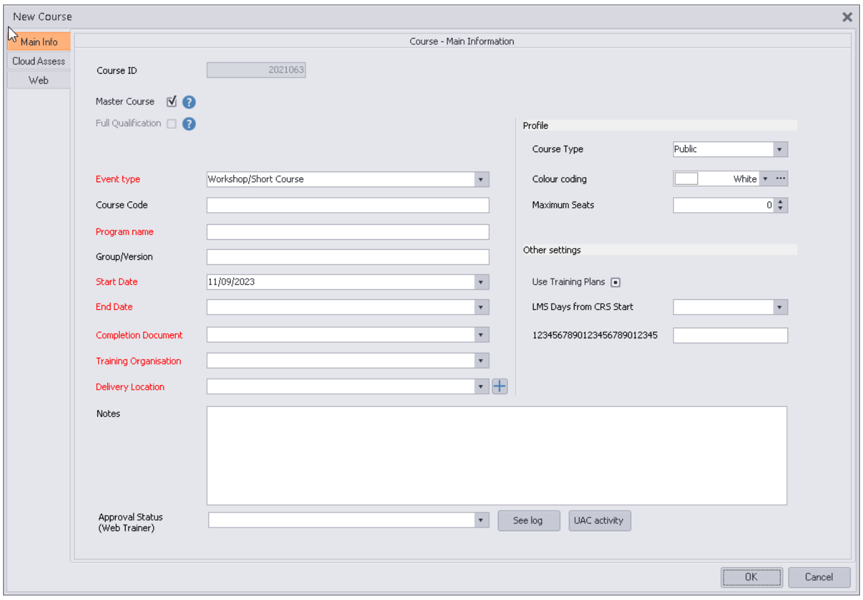
NOTE: Once a course has been deleted, it cannot be retrieved.

9. Non-Accredited Courses



The non-accredited courses component of PowerPro enables organisations to run in-house training courses that are not nationally accredited. Examples of non-accredited courses are employee inductions, Verification of Competency (VOC), and Professional Development activities.





■ **Figure above – Non-Accredited Course New Course screen**

To add a new course to the database, click the **New Course** button to open a **Course details** window which contains several tabs (see below) for adding new course information.

Tab	**Purpose**
Main info	Displays general course information including course ID, qualification/level, name, version, dates, and training organisation. Fields written in red are mandatory.
Cloud Assess/Moodle	Cloud Assess/Moodle integration specific fields
Web	Displays web publishing options

■ **Table above - Accredited course tabs**

When creating a new course, the **Main Info** tab will be displayed as default. The input fields will contain no data.

The **Course ID** field will appear grey and cannot be altered because the computer will automatically assign a Course ID. The **Full Qualification** check box will also be greyed out and unticked and cannot be altered.

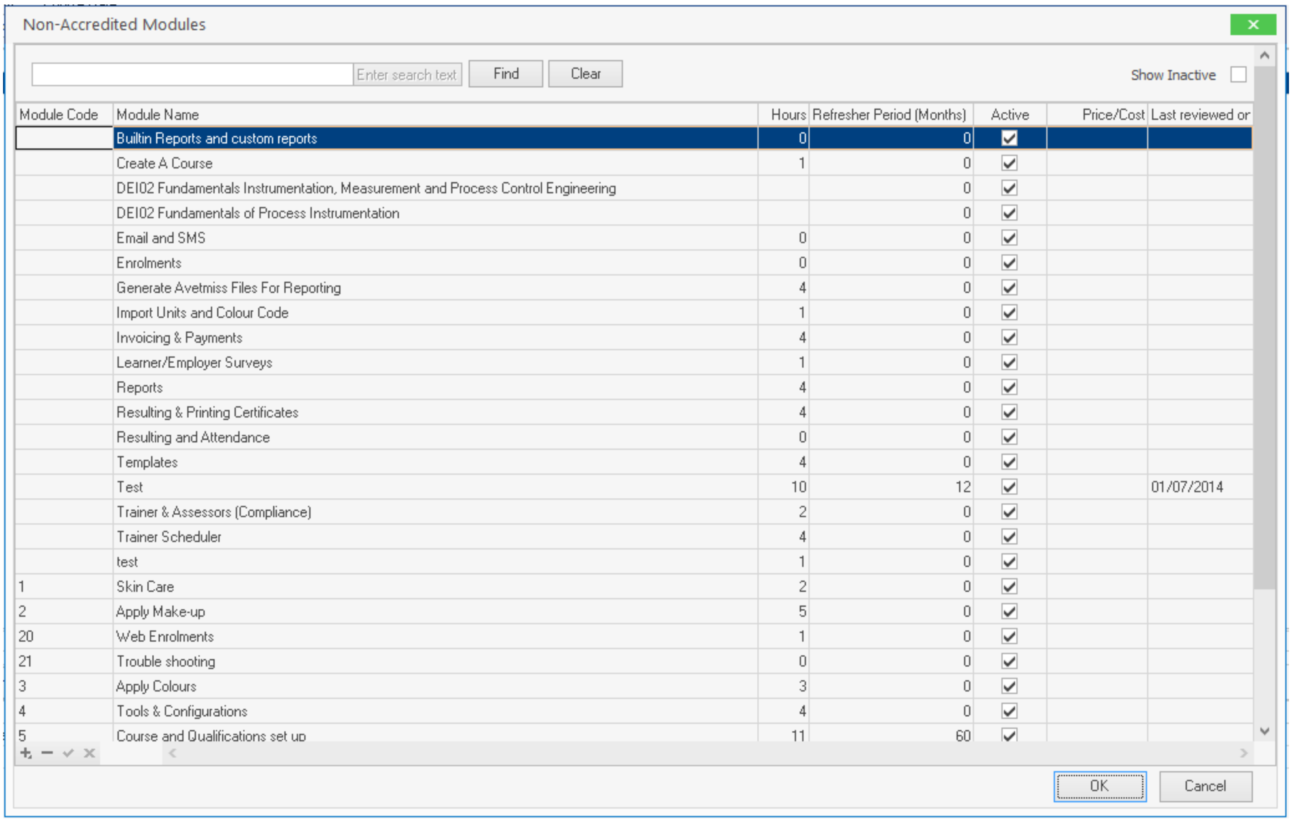
Choose the appropriate **Event Type** from the dropdown list, either Course or Workshop/Short Course.

All other fields are similar to Accredited Courses. Refer to Chapter 8.1 for more information.

9.1. Adding a New Module into PowerPro

Non-accredited courses work in a very similar fashion to accredited courses except these courses are based on modules instead of units of competency. For that reason, there is no option to import the modules, and since these are your own modules, they need to be entered manually into the system.

In the **Configuration > Non-Accredited Modules,** click on the plus symbol at the bottom left of the window. Fill out the details in this area and then click the tick to complete adding the module.



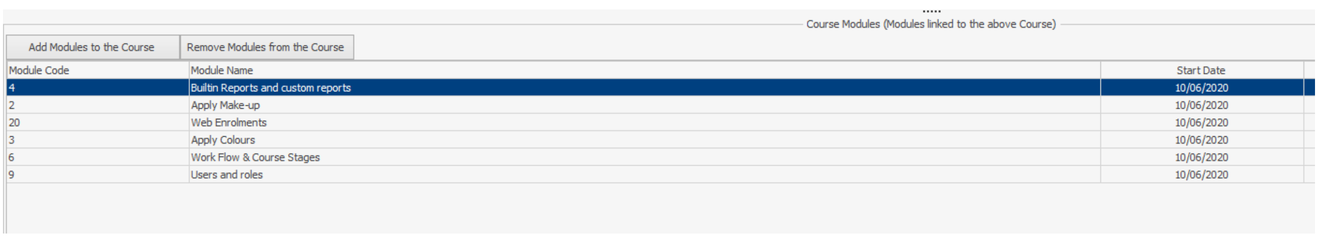
Module Code	Module Name	Hours	Refresher Period (Months)	Active	Price/Cost	Last reviewed or
	Builtin Reports and custom reports	0	0	✓		
	Create A Course	1	0	✓		
	DEI02 Fundamentals Instrumentation, Measurement and Process Control Engineering		0	✓		
	DEI02 Fundamentals of Process Instrumentation		0	✓		
	Email and SMS	0	0	✓		
	Enrolments	0	0	✓		
	Generate Avetmiss Files For Reporting	4	0	✓		
	Import Units and Colour Code	1	0	✓		
	Invoicing & Payments	4	0	✓		
	Learner/Employer Surveys	1	0	✓		
	Reports	4	0	✓		
	Resulting & Printing Certificates	4	0	✓		
	Resulting and Attendance	0	0	✓		
	Templates	4	0	✓		
	Test	10	12	✓		01/07/2014
	Trainer & Assessors (Compliance)	2	0	✓		
	Trainer Scheduler	4	0	✓		
	test	1	0	✓		
1	Skin Care	2	0	✓		
2	Apply Make-up	5	0	✓		
20	Web Enrolments	1	0	✓		
21	Trouble shooting	0	0	✓		
3	Apply Colours	3	0	✓		
4	Tools & Configurations	4	0	✓		
5	Course and Qualifications set up	11	60	✓		

Figure above - Non-Accredited Module window

9.2. Attaching a module to a course

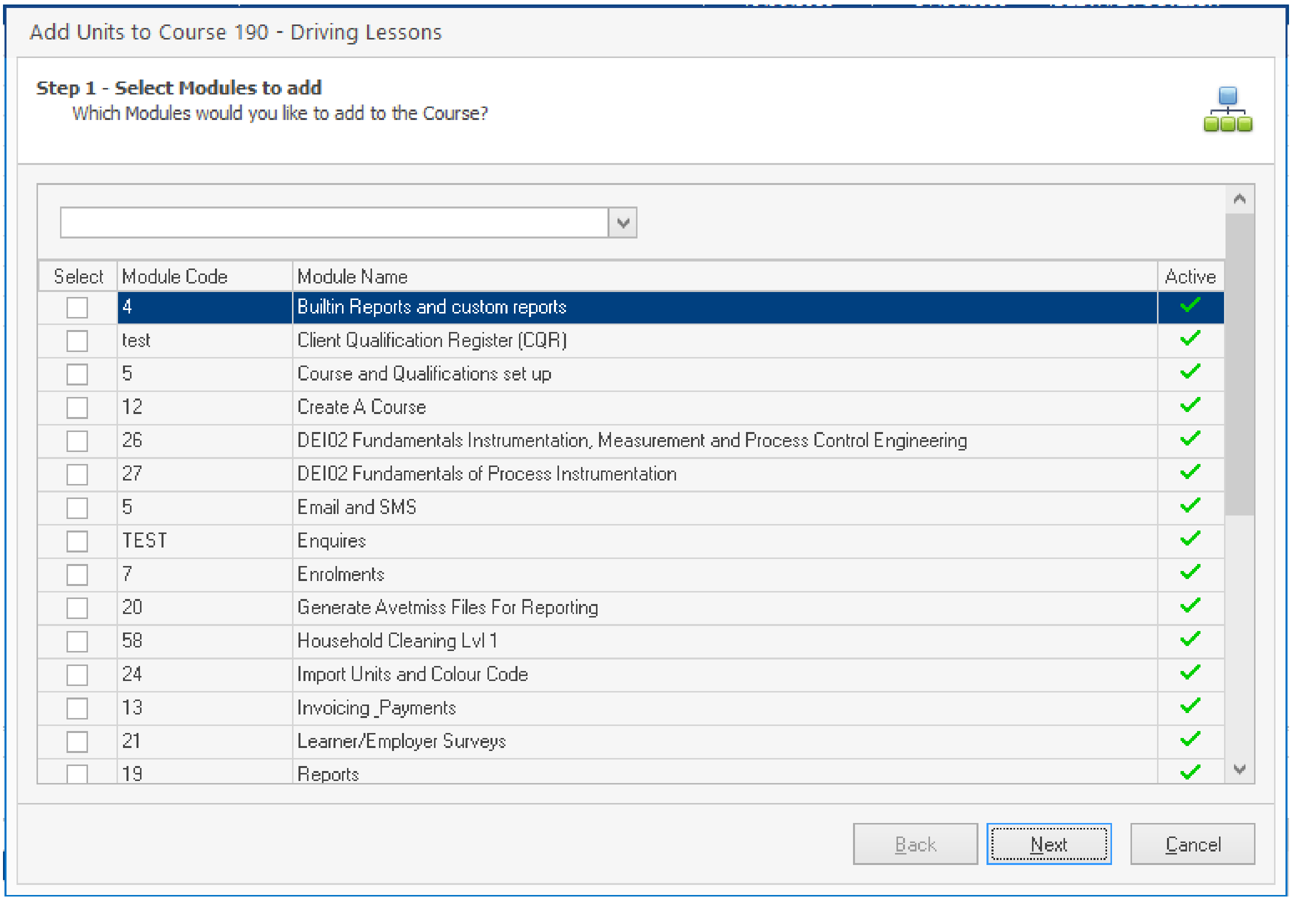
In the **Non-Accredited Courses** tab, ensure the course you wish to add a module(s) too is selected. Once this course has been selected, click on the **Add Modules to the Course** button – this will open the same window as the **Accredited Courses** but of course with the modules that were created.

To remove a module from a course, highlight the module and click **Remove Modules from the Course** button.



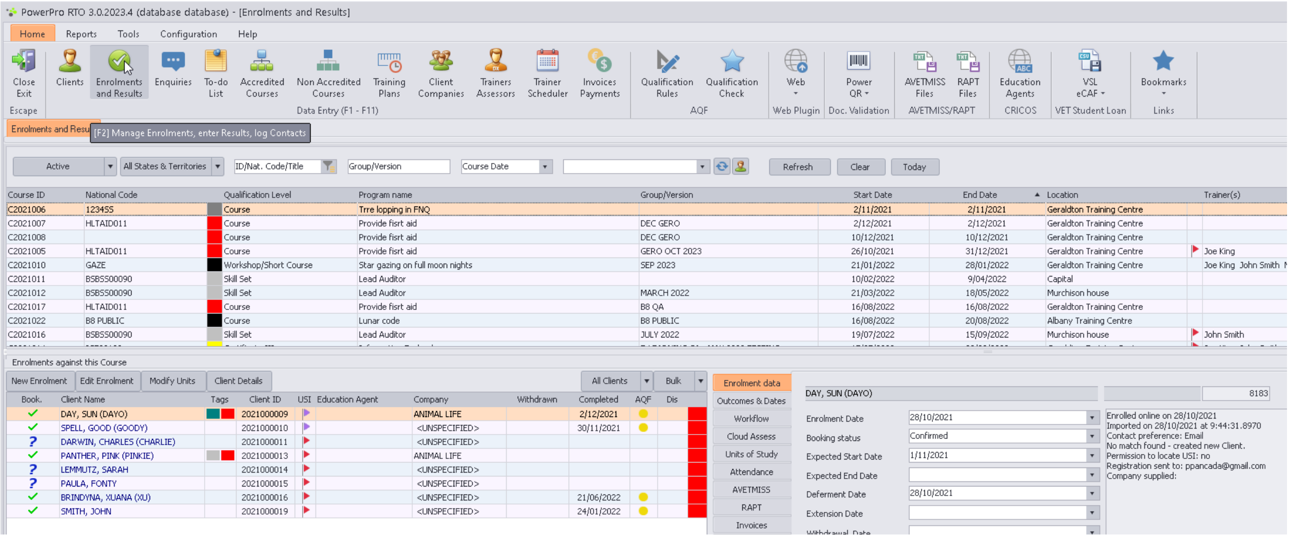
Module Code	Module Name	Start Date
4	Builtin Reports and custom reports	10/06/2020
2	Apply Make-up	10/06/2020
20	Web Enrolments	10/06/2020
3	Apply Colours	10/06/2020
6	Work Flow & Course Stages	10/06/2020
9	Users and roles	10/06/2020

■ **Figure Above – Adding modules to course area (Non-Accredited Courses)**



■ **Figure above – Add modules to course box**

10. Enrolments and Results



10.1. Enrolling Clients in a Course manually

To manually enrol clients in a course (under the Enrolments and Results tab), first select the course in the course enrolments panel, and then click the **New Enrolment** button in the course enrolments panel. The **Enrol Clients in a Course** screen will open in a new window.

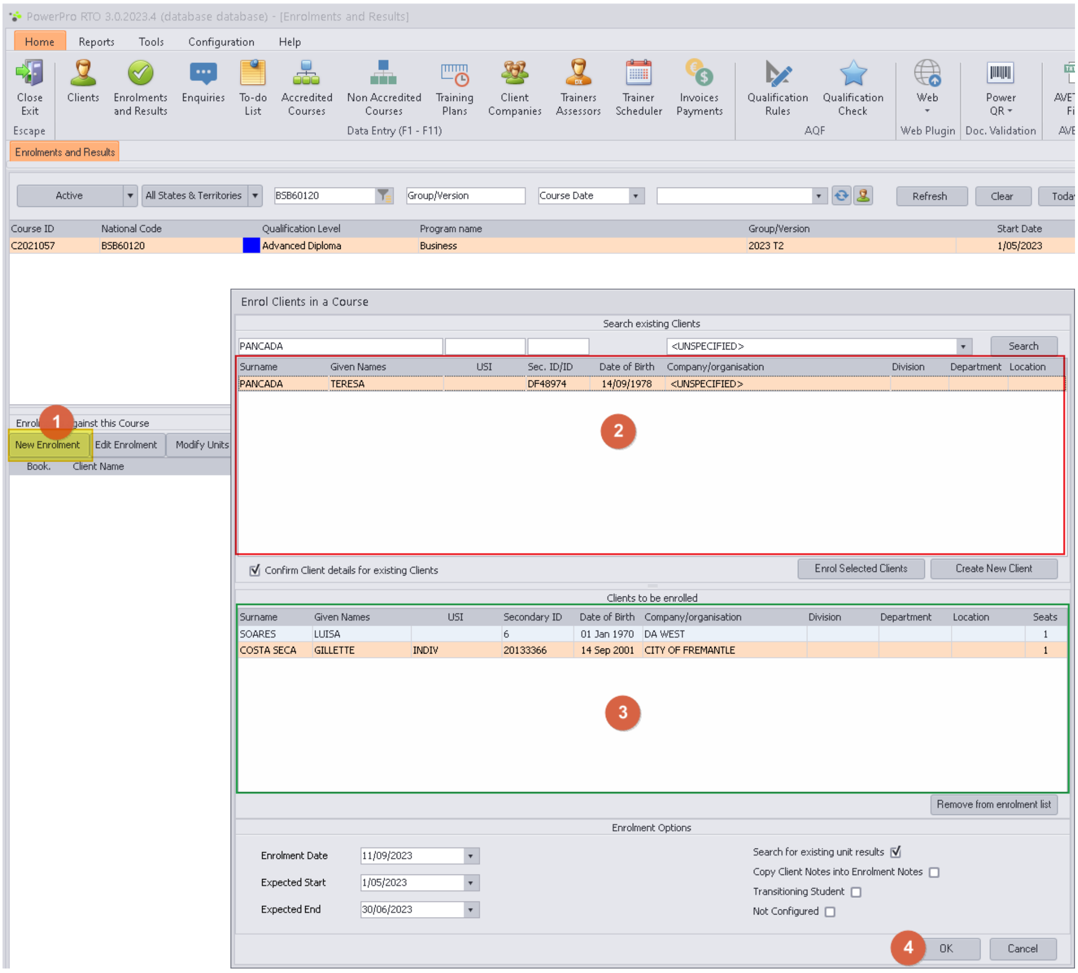


Figure above - Enrol Clients in a Course screen

Select the clients to enrol from the client list (top section of the screen) and click the **Enrol Selected Clients** button to add them to the clients to be enrolled list (bottom section of the screen).

You can search for the client using the **Find** function. Enter the given name/surname (or part of it) of the client in the **Name Pattern** box and click the **Find** button to find any matches. Then click on the student and hit the **Enrol Selected Clients**.

If you do not find the client in the list, it means this is a new client and therefore needs to be entered in the database. Click on **Create New Client** button. The new client screen will open in a new window. Refer to Chapter 3 for further information on how to add a new client into PowerPro.

Use the **Enrolment Date, Expected Start and Expected End** fields to set these dates for all clients you are about to enrol.

Once you have finished adding clients to the **Clients to be Enrolled List**, click the **OK** button.

If the course contains optional units, the **Select Optional Units** screen will appear after you have clicked the **OK** button. Select the optional units that apply to the client(s) you are enrolling by checking the corresponding checkboxes:

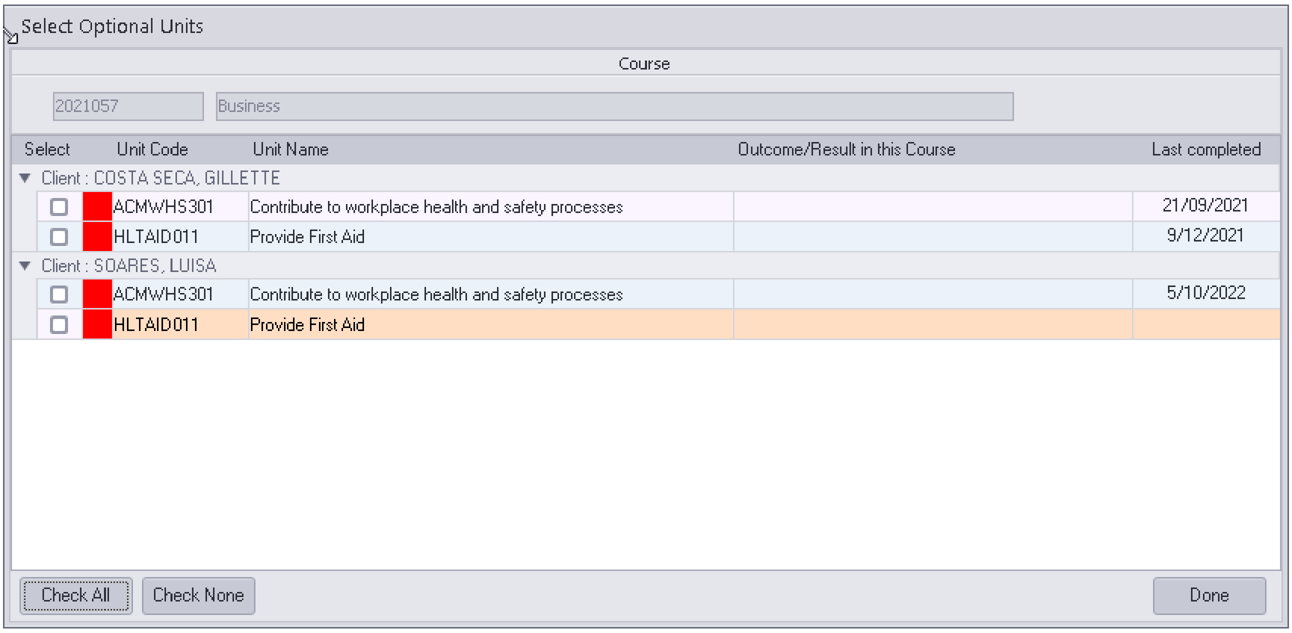


Figure above - Select Optional Units screen

All the clients you selected will now appear in the course enrolments panel for the selected course.

NOTE: If you do not see the clients listed, your panel maybe hidden. Drag your cursor over the dots and expand the window.

10.2. Updating Client Results

To award results by client, select the relevant course from the course list panel (under the **Enrolments and Results** tab), then click the **Bulk** button and choose the **Resulting & Dates – by Client** option:

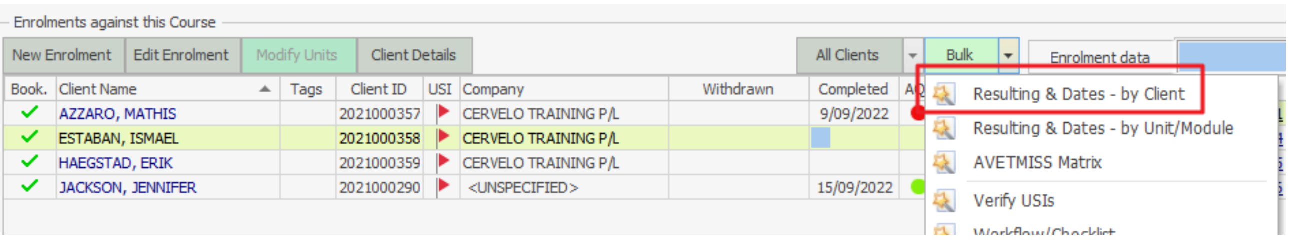


Figure above – Bulk resulting by Client

The **Bulk resulting** screen will appear:

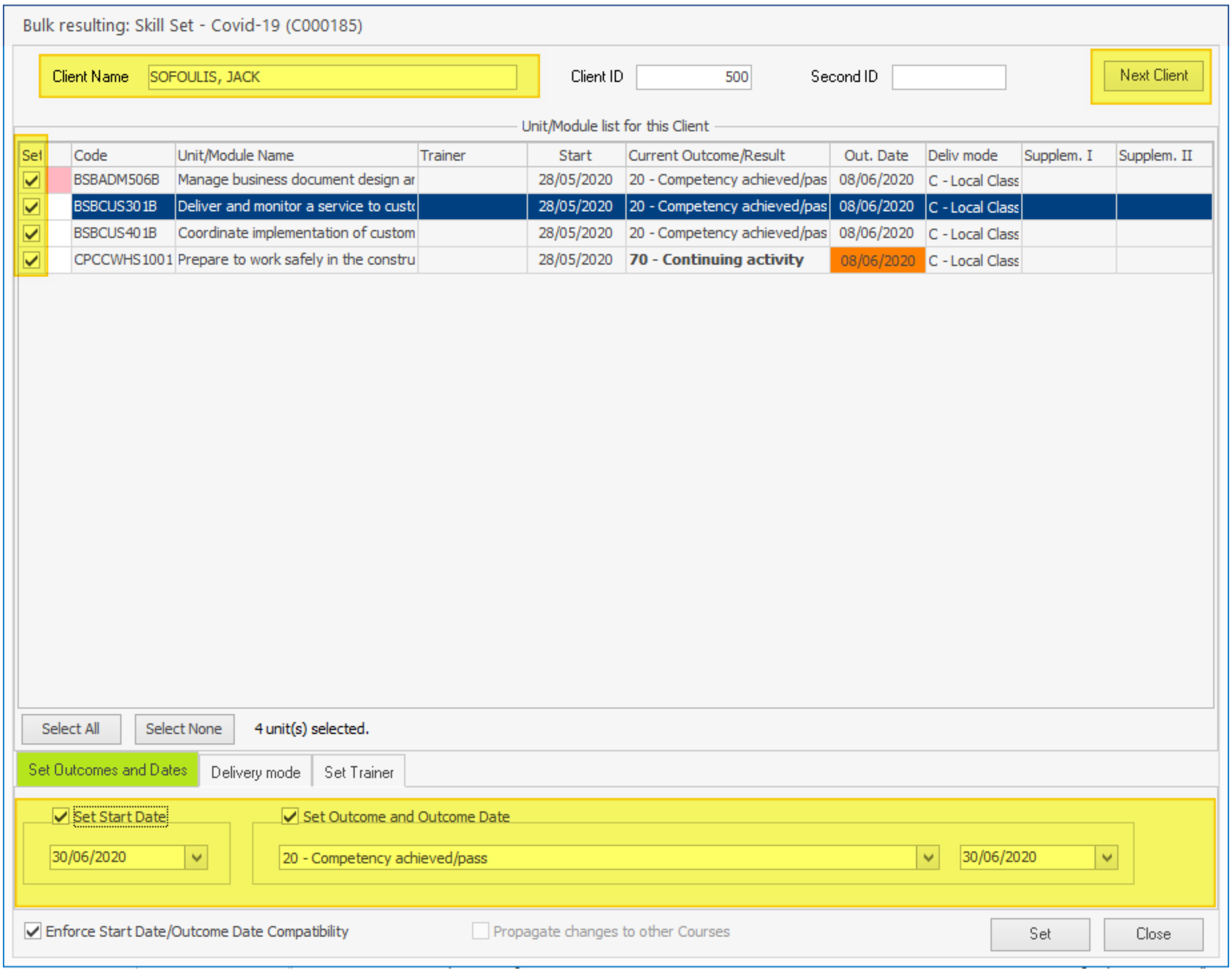


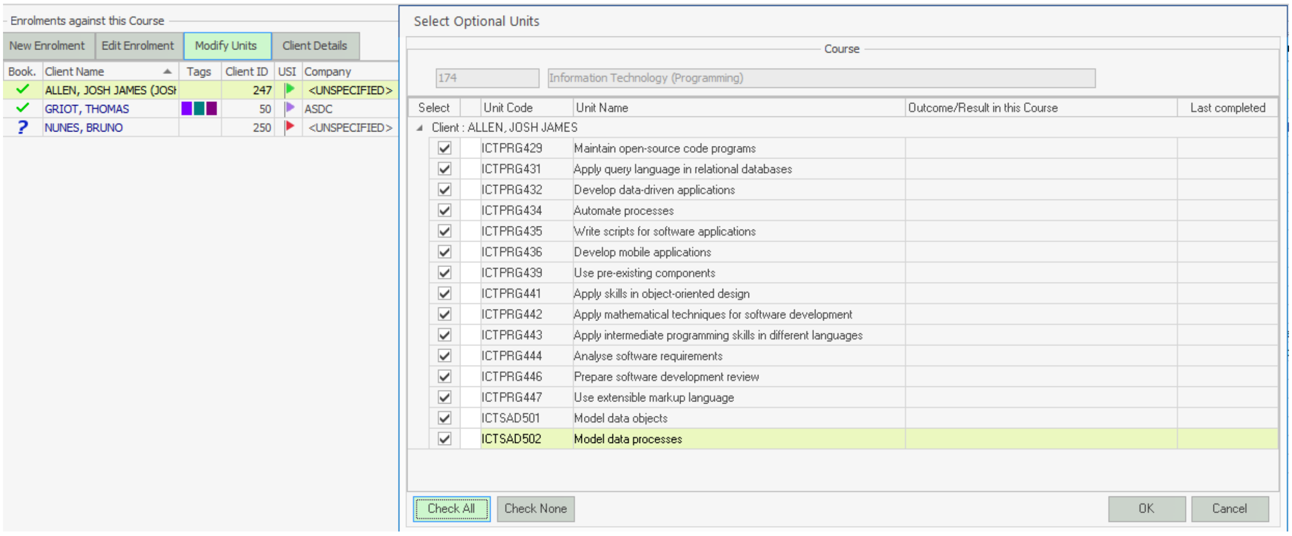
Figure above – The Bulk Resulting by Client window

1. Check the boxes in the **Set** column for each unit/module you want to update. Click the **Select All** button to check all the checkboxes if required.
2. Check the box to **Set Outcome and Outcome Date.**
3. Select the outcome/result (defaults to "Competent") from the list and specify the result date.
4. Click the **Set** button to apply changes.

To update other results for other units or modules for this client, repeat the above steps. Once you have finished updating results for the client you can navigate to the next client in the course by clicking on the **Next Client** button.

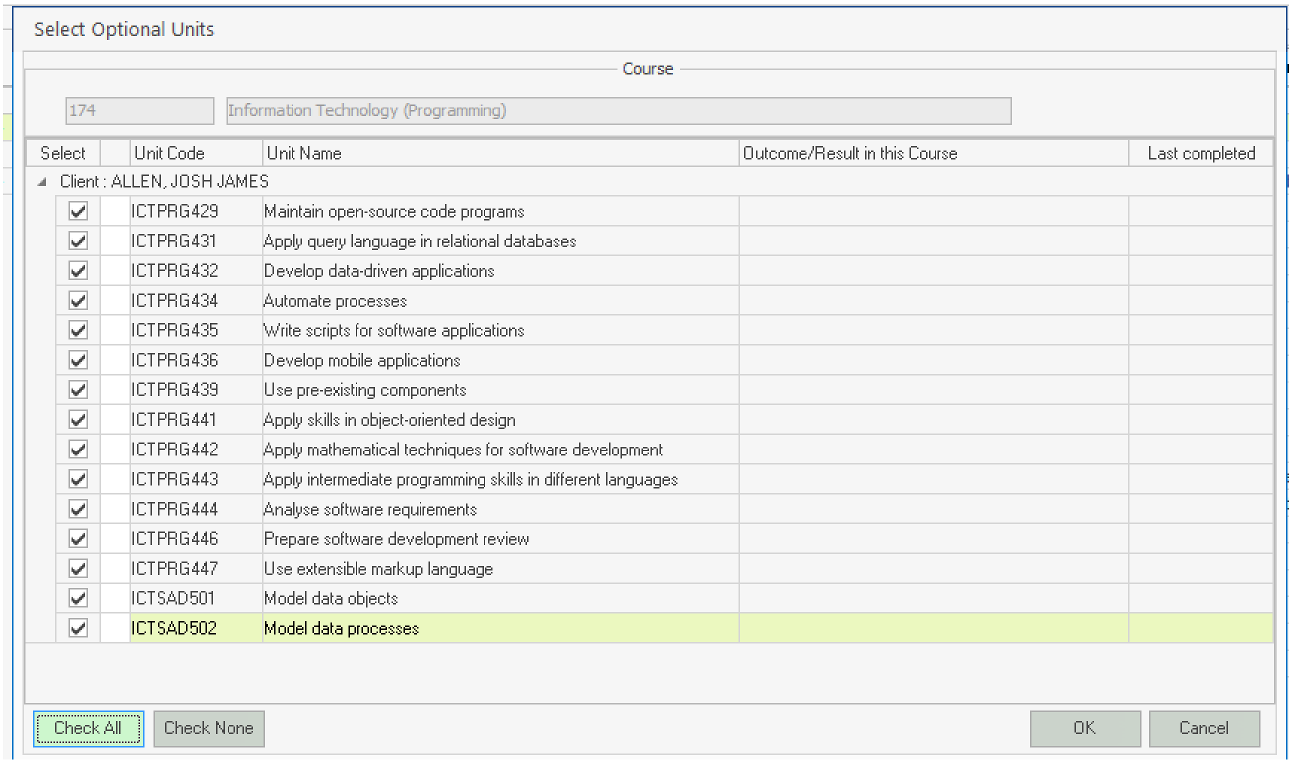
10.3. Modifying Client Units Selection

Courses are often made of mandatory and optional units. Mandatory units are for everyone in the course while optional units can be selected differently for each client. To modify the optional units for a client please do as follows:



■ **Figure above – Modifying Client units**

1. Highlight the relevant client (*Josh Allen* in the example above).
2. Click on **Modify Units**.
3. The Select Optional Units window pops up:



4. Check or uncheck the boxes for the relevant units and click on **Done**.

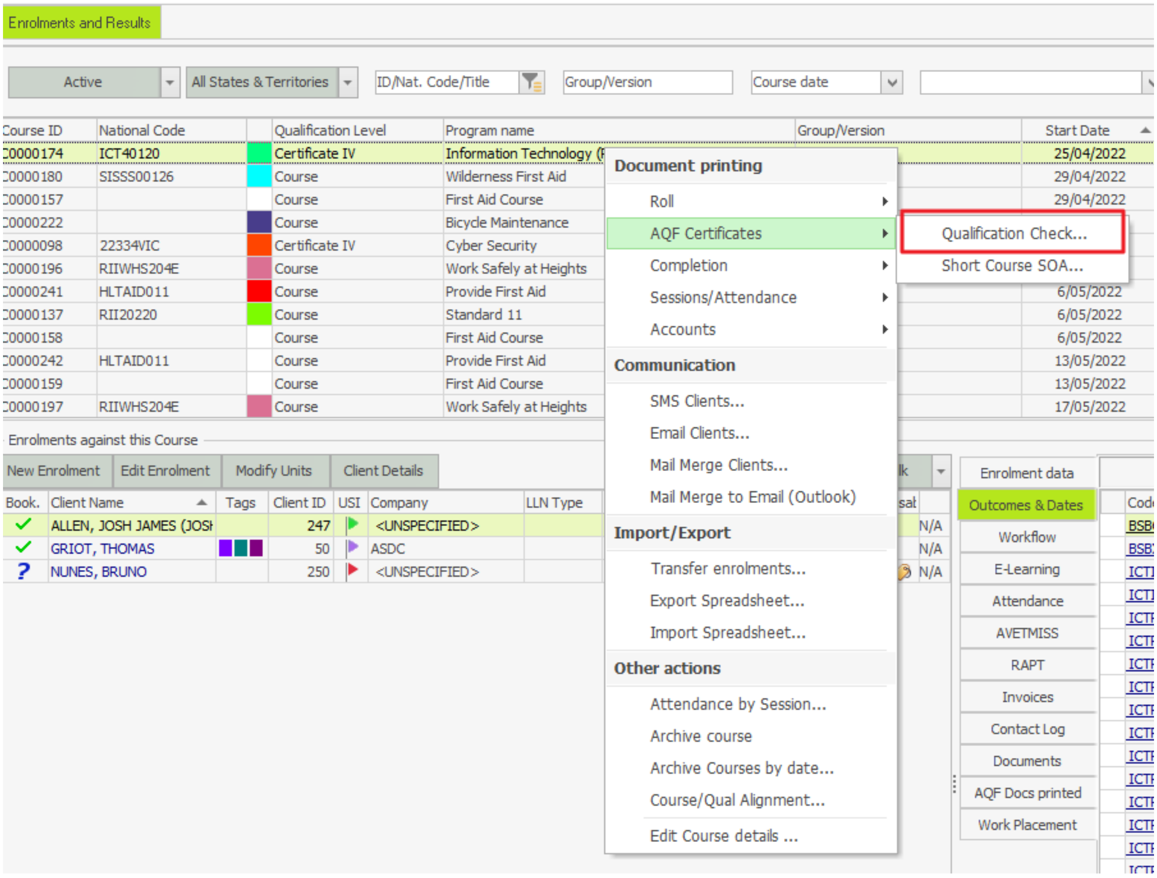
NOTE: The system prevents users from removing optional units for which there is a final result recorded.

11. Printing Certificates, Statements of Attainment and Certificates of Attendance

11.1. Certificates from Full Qualifications

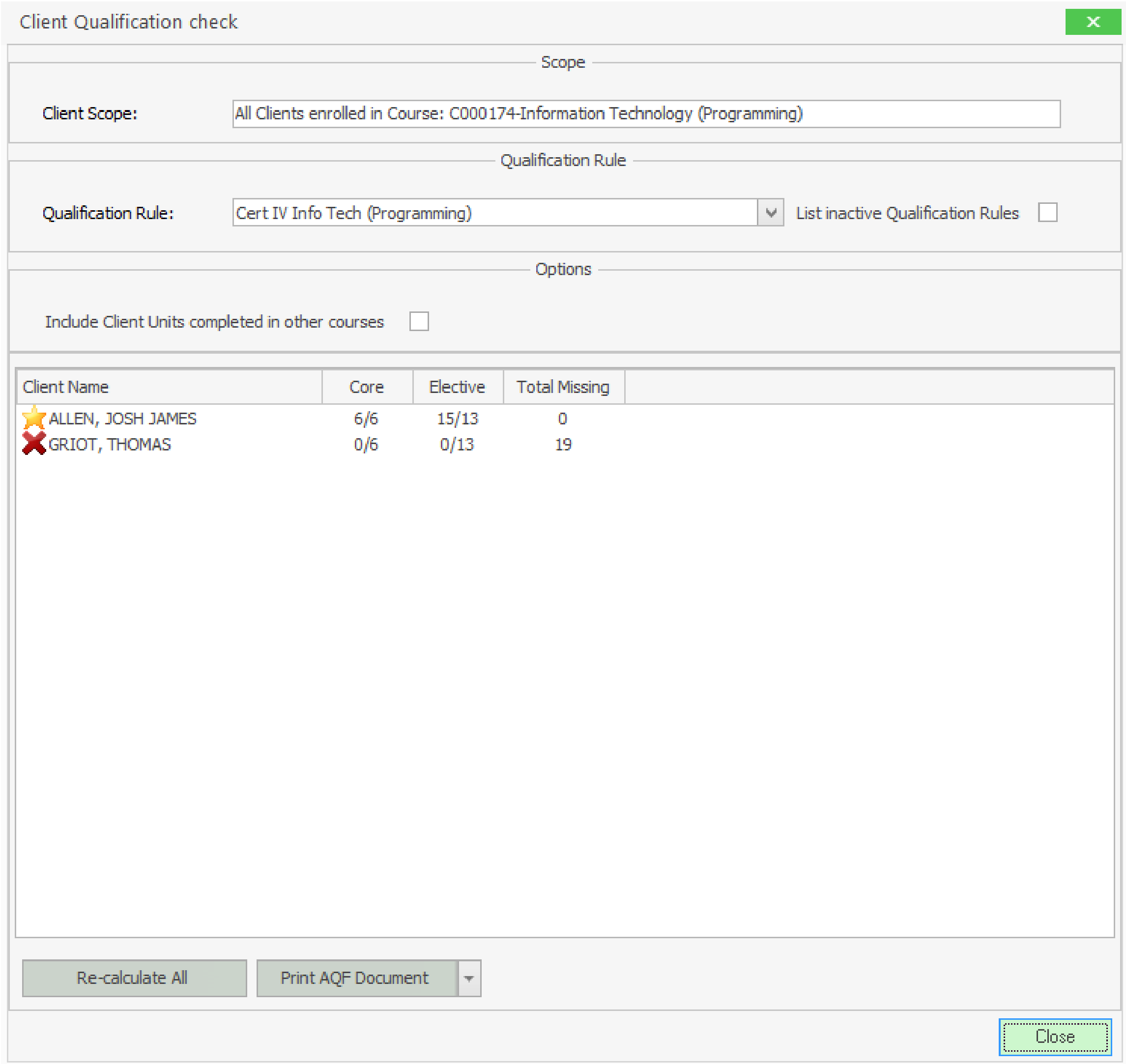
To print Certificates and Statements of Attainment you need to conduct a **Qualification Check**. This checks if the client(s) selected has completed the units required for a Qualification (e.g., "Diploma of Business"). The units required are specified in the Qualification Rule area of the system which is covered in Qualification Rules.

To carry out a qualification check, right-click on the Course (within Enrolments and Results) and select the relevant option:



■ Figure above - Checking course participants against a qualification rule

A new window pops up showing all participants in the course flagged with a red cross or a yellow star. The yellow star sign indicates students eligible for a Certificate (and for a Record of Results):



■ **Figure above – Qualification check for a group of students**

Clients flagged with a red cross are not eligible for a certificate (Qualification) but may be eligible for a Statement of Attainment if they have completed at least one unit from the Qualification. Please see table below:

Symbol	Meaning	Notes
	Qualification completed	Client is eligible for a **Certificate and a Record of Results** for this Qualification.
	Qualification not completed	Client is eligible for a **Statement of Attainment** if he/she has achieved at least one unit of this Qualification (as per relevant Qualification Rule).

■ **Table above –Qualification check symbols**

To print Certificates, Statements of Attainment and Transcripts of Results press the **Print AQF Document** dropdown button and select the relevant option from the menu:

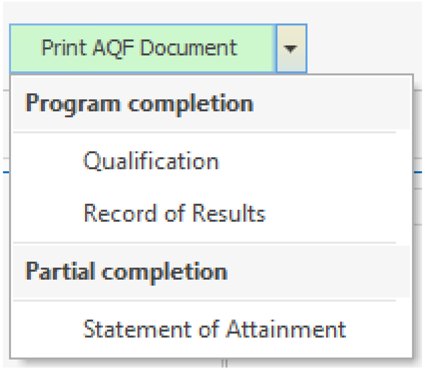


Figure above – Printing AQF Documents

Selecting **Qualification** from the above menu brings up a new window listing only Clients (from this course/group) eligible for that document. Adjust the Client selection using the **Select** checkbox column if required:

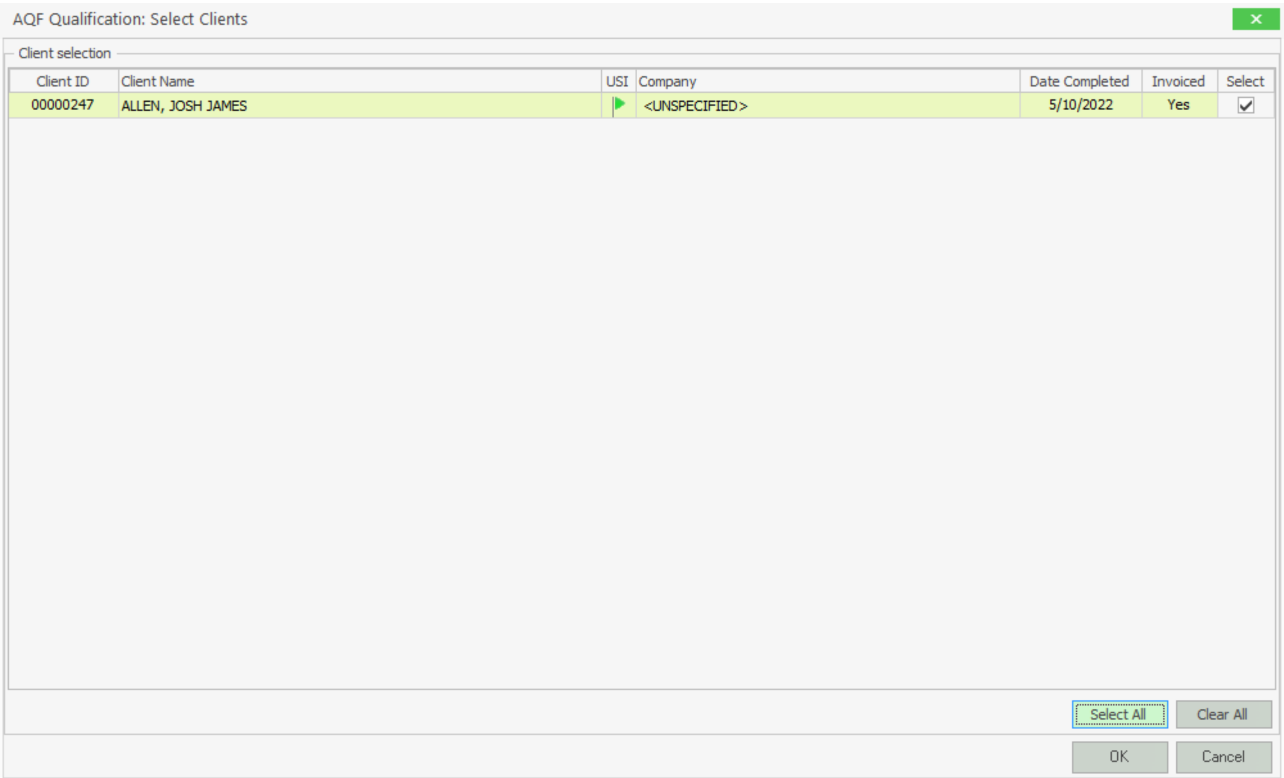


Figure above – Adjust Client selection before printing certificates

This example is quite straight-forward – there is only one eligible client. Press **OK** to proceed. A new window (**Select Document Template**) allows you to select the template to be used as well as the option of attaching a copy of the document to the Client record in PowerPro:

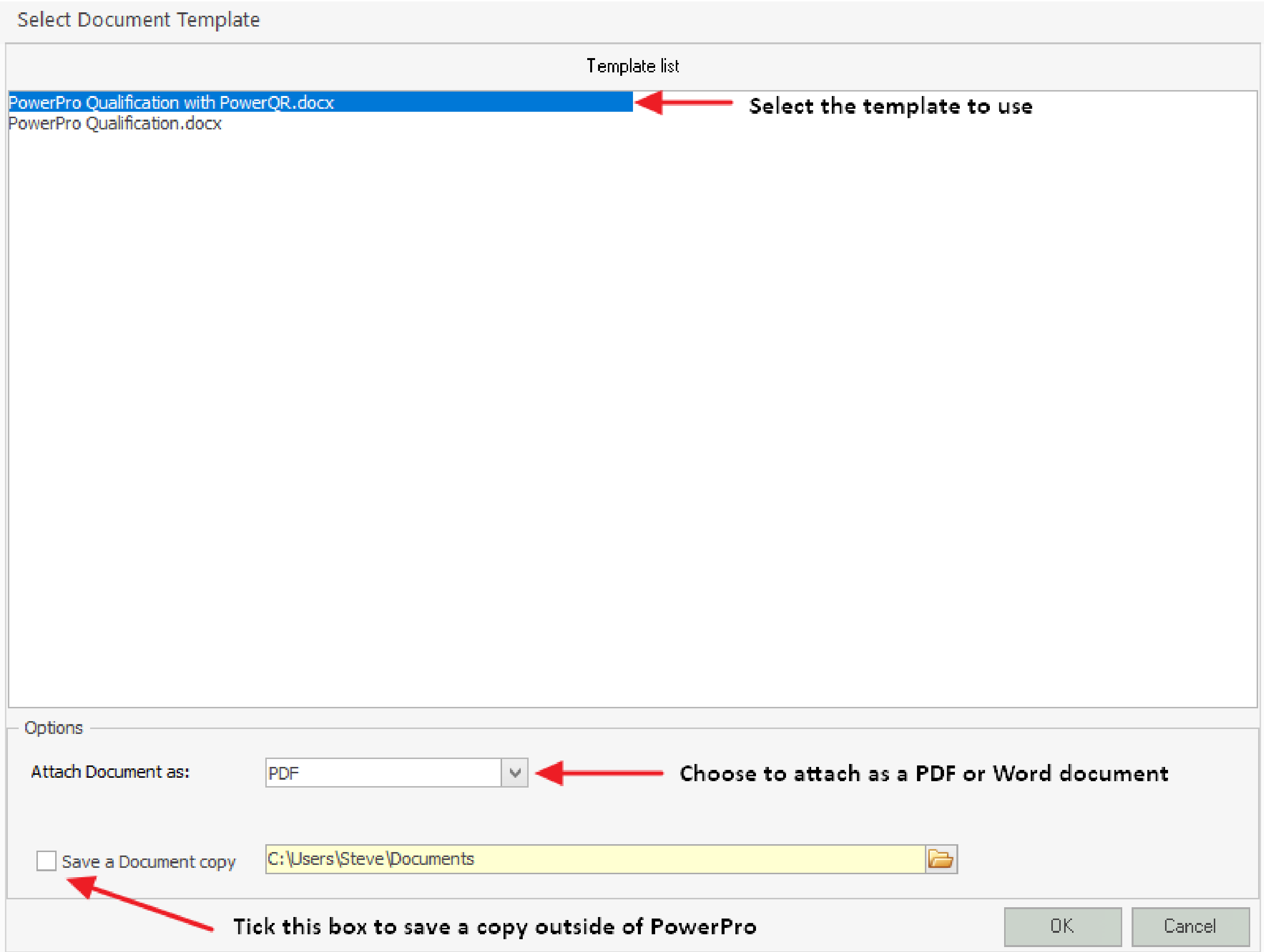


Figure above – User options when printing certificates

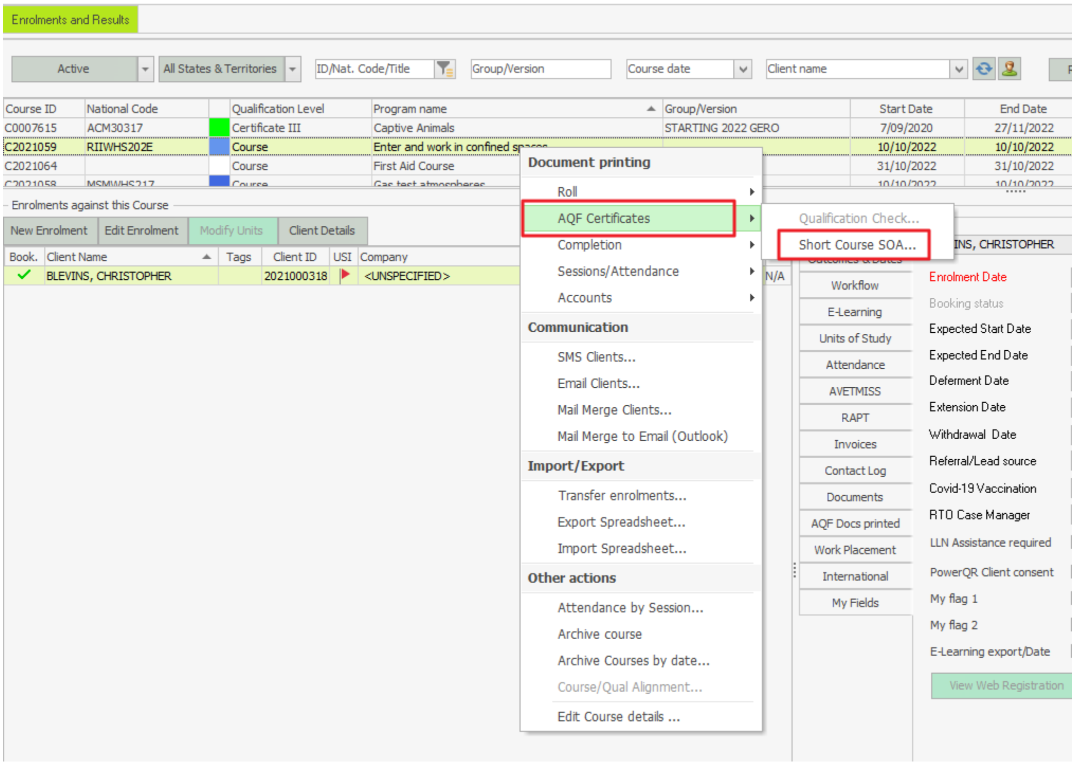
Finally press **OK** to generate the Certificate(s) as per Client selection and user options.

Use the procedure described above and select the relevant option from the **Print AQF Document** menu to print Transcripts of Results and Statements of Attainment.

Full Qualifications – when achieved the Certificate and Record of Results need to be generated for the client. You can print off individually or you can combine the two documents in one. To use this option the template with these two documents needs to reside in the Transcript Template folder and when Printing select the Record of Results and select the template to use.

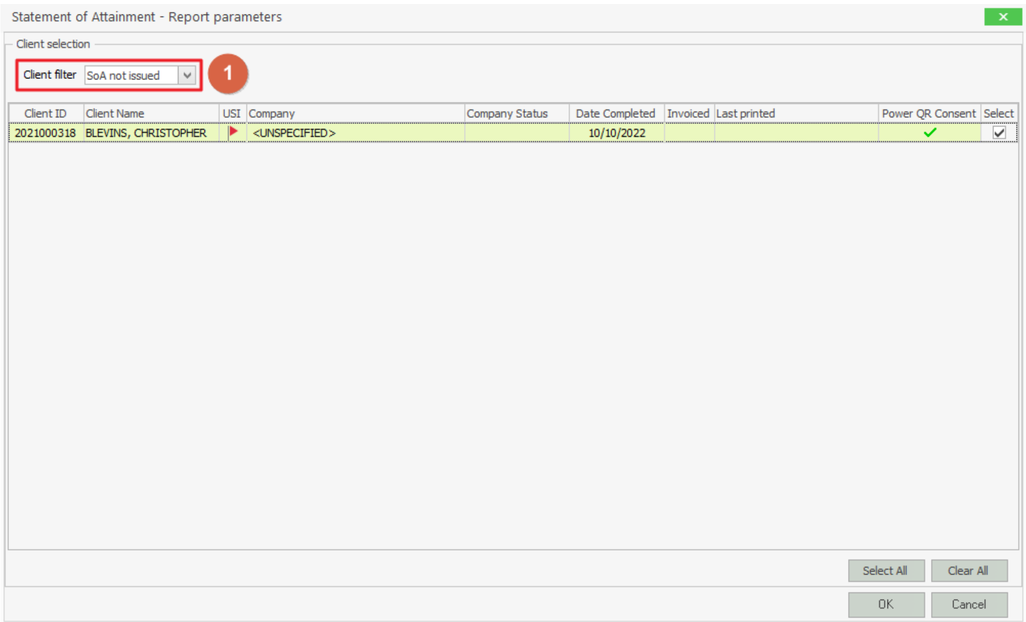
11.2. Printing Statements of Attainment for Short Courses

Short Course Statements of Attainment are called "Unit Based SOA" in PowerPro. To generate these, right click on the Course (in Enrolments and Results), select AQF Certificates and select **Short Course SOA**.



■ **Figure above – Printing Short Course SOA Documents**

The next window lists any clients eligible for a Statement of Attainment. By default it shows only those clients that have not been issued an SOA and pre-select those who have a verified USI. You can on the Client Filter dropdown select All Clients if required.

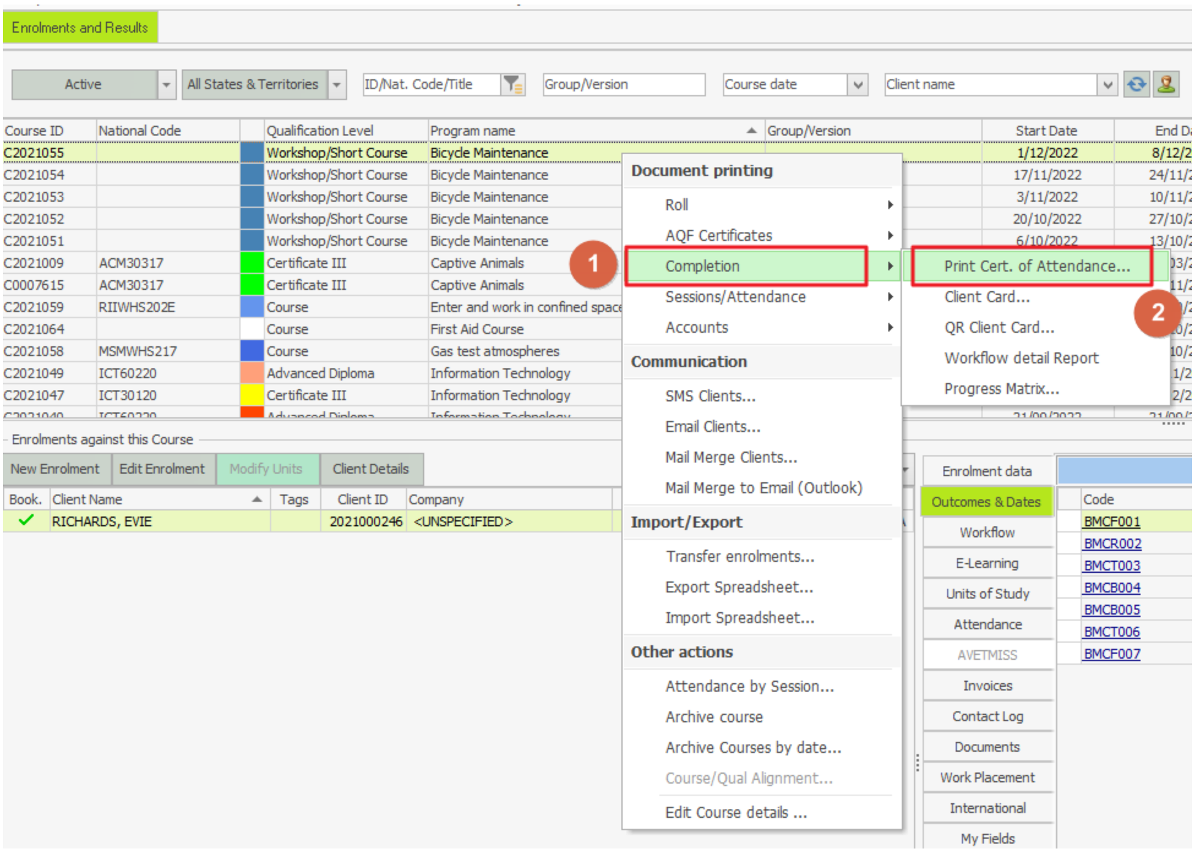


■ **Figure above – SOA Client Selection screen**

Click OK, on the next screen select the template to use as well as the option of attaching the final document as a PDF or as a Word Document.

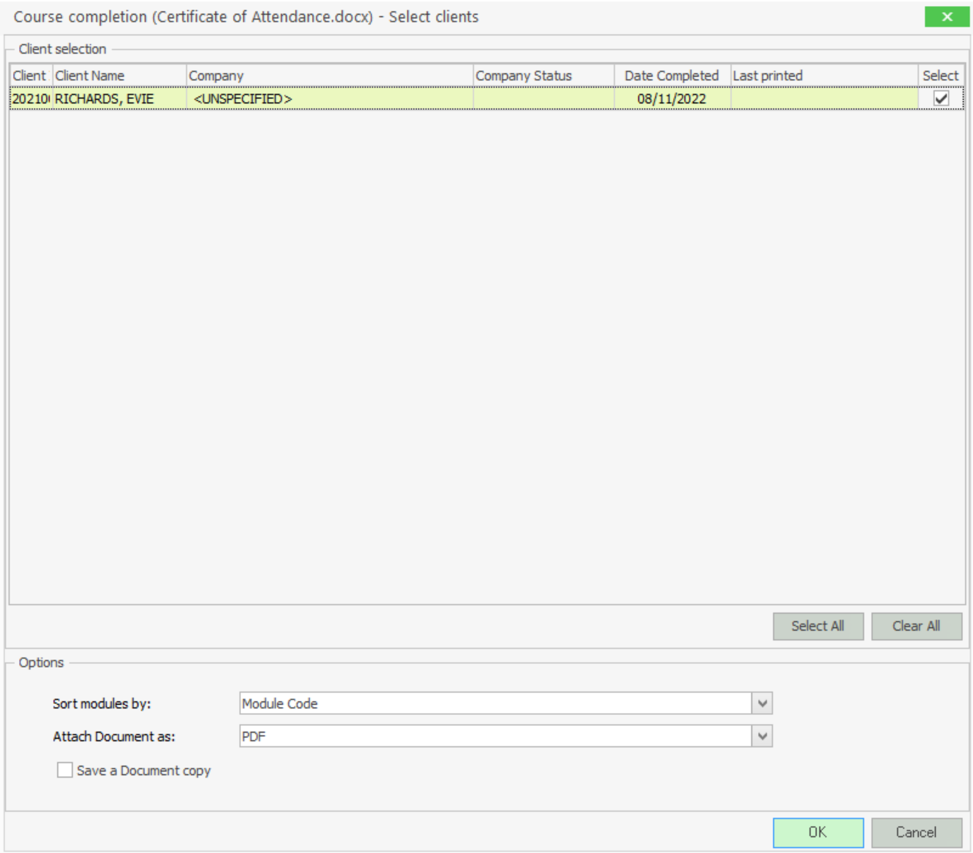
11.3. Printing Certificates of Attendance

As previously mentioned, Certificates of Attendance are issued to clients completing Non-accredited training programs. To issue a Certificate of Attendance, (in the Enrolment & Results window), right click on the relevant Course and expand the "Completion" menu to choose the option "Print Cert of Attendance":



■ **Figure above – Printing Certificate of Attendance Documents**

The next window lists clients who have completed the Course - eligible for the Certificate of Attainment:



■ **Figure above – Certificate of Attendance Client Selection screen**

Options

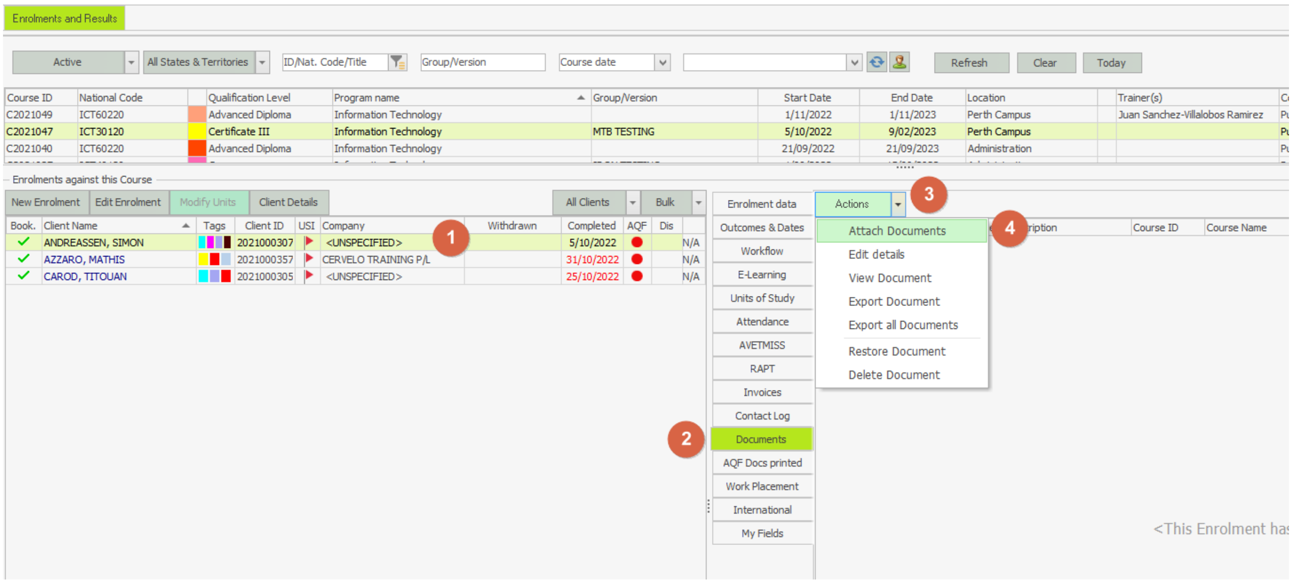
Sort modules by	Choose the field used to sort the Modules on the Certificate
Attach Document as	Choose to attach a copy of the Certificate to the client enrolment (PDF / Word)
Save a Document copy	Save a copy of the Certificate into the user selected folder

12. Client / Enrolment Functions

12.1. Attaching documents to a Client/Enrolment

PowerPro RTO supports document attachments. These can be scanned assessments for evidence tracking purposes, proof of ID, Statements of Attainment for Credit Transferred Units, signed enrolment forms, etc. Documents attachments are stored within the PowerPro database and are linked to the client or to the client enrolment.

To attach documents to an enrolment please do as follows:



■ **Figure above – Attaching documents to a Client enrolment**

1. Highlight the relevant client (*Simon Andreassen* in the example above).
2. Open the **Documents** tab.
3. Press the **Attach Docs** button (or drag and drop files from windows explorer).
4. The **Multiple Document Attachment** window will be displayed.

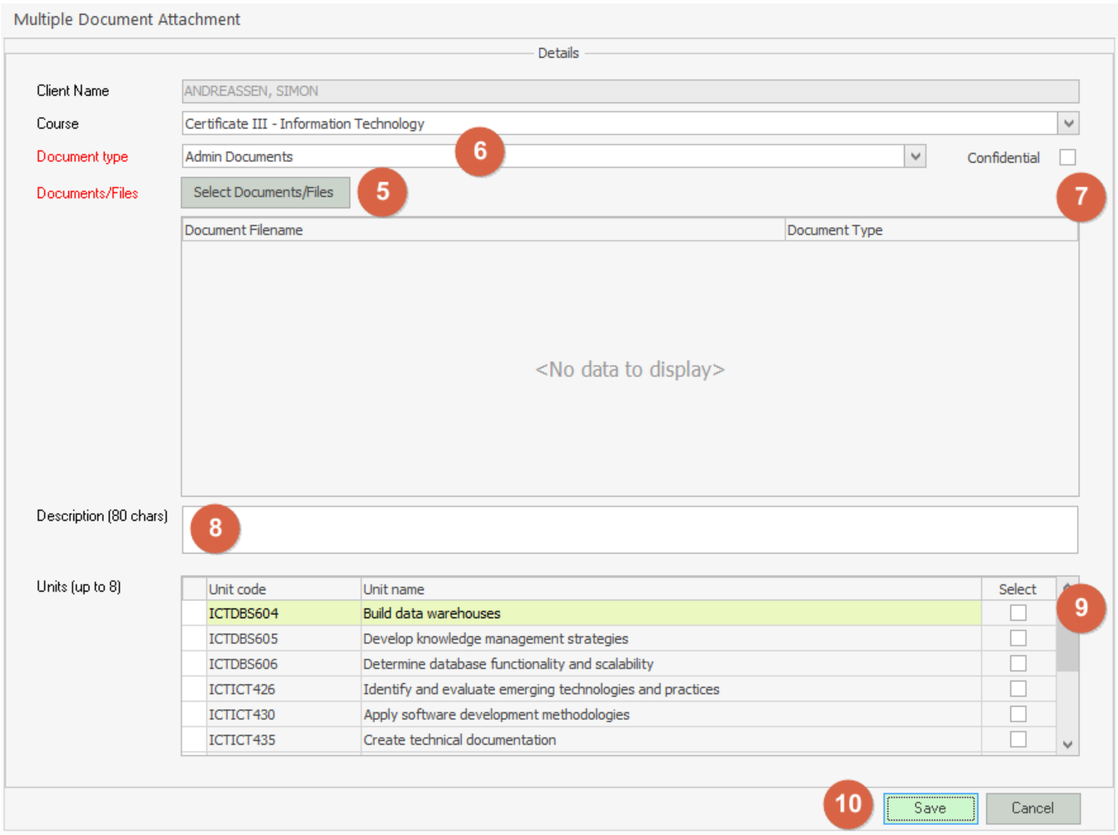


Figure above – Options when attaching documents to a Client enrolment

5. Click on **Select Documents/Files** to choose the document(s) to attach (if you have not done that via drag & drop).
6. Select an entry from the **Document Type** list to categorise the document(s).
7. If the document is Confidential, check the **Confidential** check box.
8. Enter an optional description of the document(s) being attached.
9. If the document(s) relate to particular unit(s), check the appropriate boxes on the **Select** column.
10. Press **Save** to attach the document(s).

Note: It is a good principle not to attach large documents/files as the database will grow large quickly. Check your scanner resolution so that any scanned document is reasonably small. As a rule of thumb, a one-page PDF scanned document should be no more than 400kb in size.

12.2. Creating a Contact Log for a Client/Enrolment

The **Contact Log** is a multi-purpose student related event register. This can be used to record and track any event related to the student. Some examples are:

- Student absentee
- Email or SMS sent to student
- Phone call
- Assessment
- Complaint
- WSE/OH&S incident

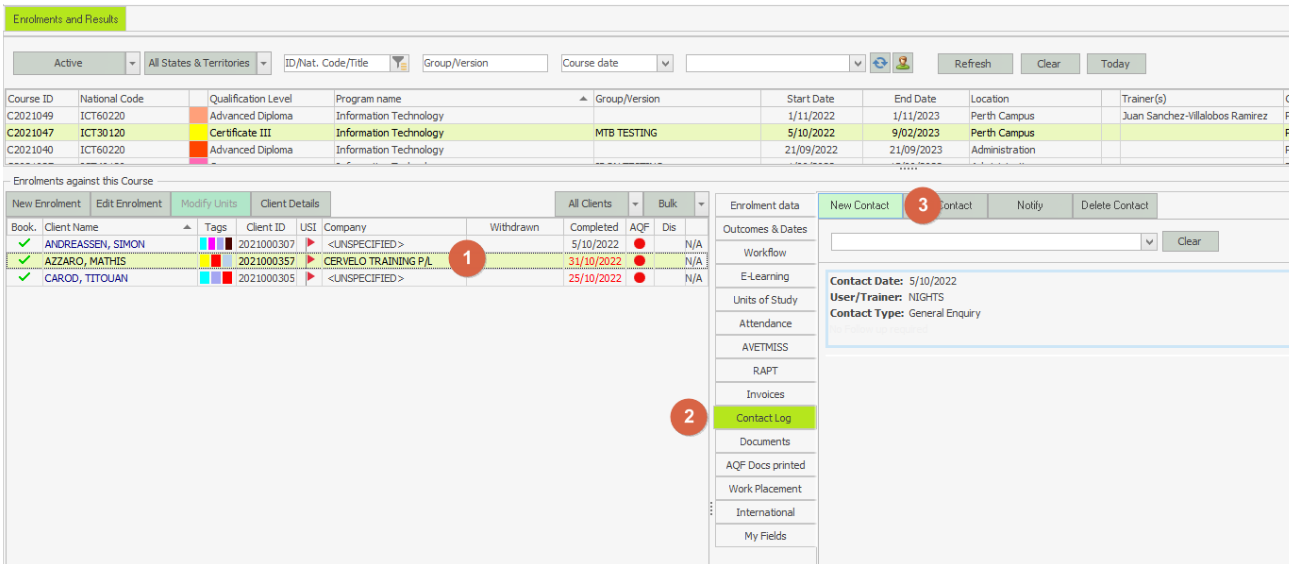


Figure above – Creating a Contact Log record against a Client enrolment

To create a Client Contact Log, please do as follows:

1. Highlight the relevant client (*Mathis Azzaro* in the example above).
2. Open the **Contact Log** tab.
3. Press the **New Contact** button.
4. The **Contact Log** window is displayed.

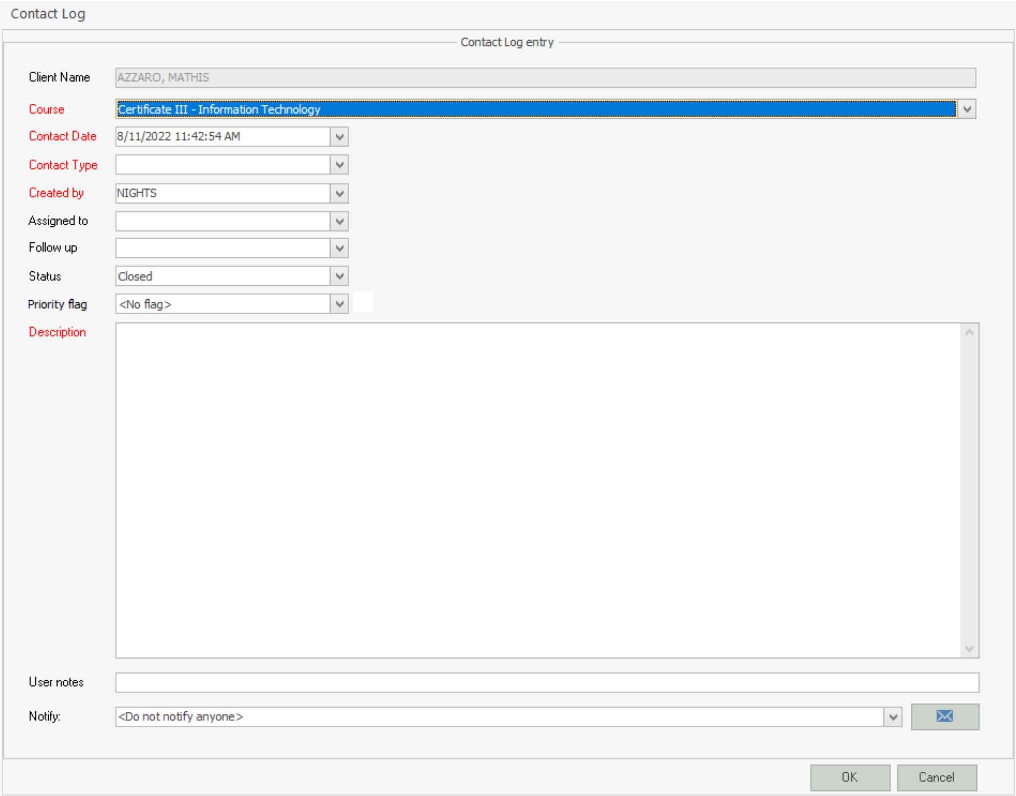


Figure above – Creating a Contact Log for a Client

5. Fill in the mandatory fields.
6. Optionally enter a **Follow Up** date.
7. Optionally select a **Priority Flag**.
8. Optionally enter any trainer or admin notes under **User notes**.
9. Press **OK** to save the Contact Log record.

Note: The **Reports Tab > Client Reports> Contact Log** report can be used to extract Information entered in this area.

12.3. Emailing a Client or a group of Clients

PowerPro allows emailing course participants individually or in bulk. The advantage of doing it from PowerPro is that you can keep a record that the email was sent (including the content of the email) as a Contact Log. The other great advantage is the use of Email templates.

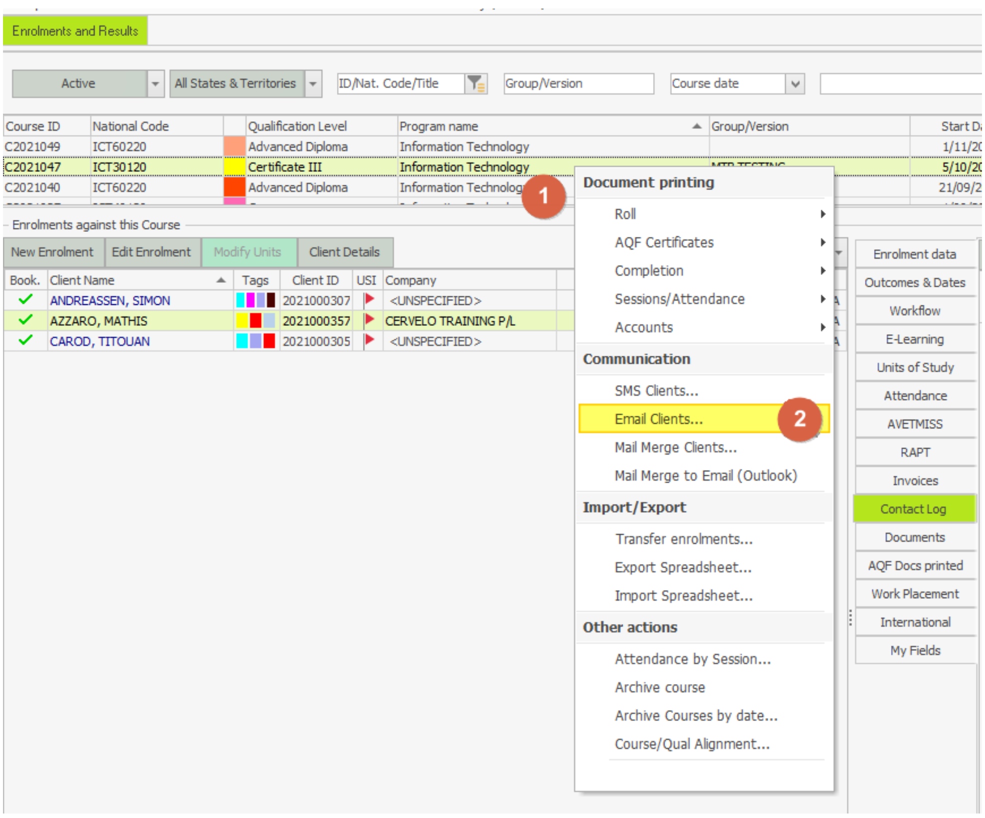
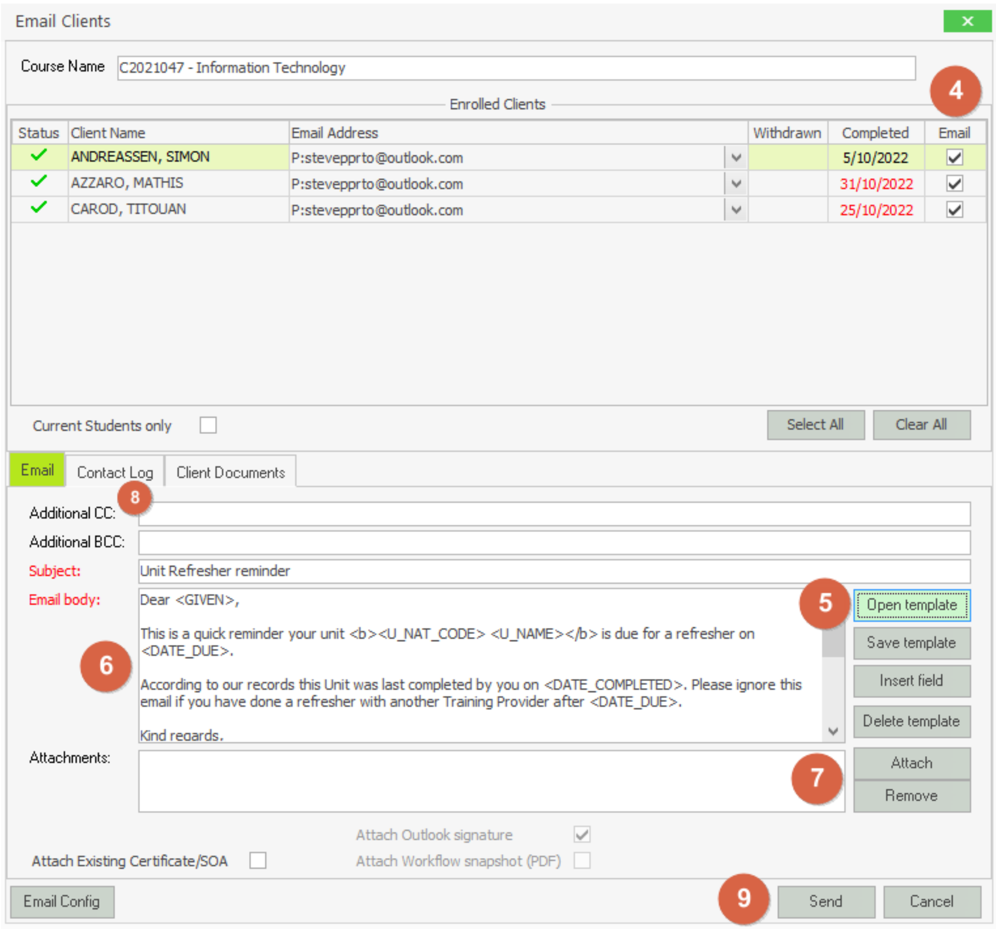


Figure above – Emailing a group of clients

To email a group of students please do as follows:

1. Right-click on the relevant Course/Group (Course number *21047* in the example above).
2. Select the **Email Clients…** item from the pop-up menu.
3. The **Email Clients** window is displayed.



■ **Figure above – Composing the email**

4. Check the **Email** boxes for the relevant recipients.
5. Optionally click on **Open template** to use an email template.
6. Adjust the **Email body** if required.
7. Optionally attach any documents/files using the **Attach** button.
8. Open the **Contact Log** tab to enable/disable logging of the email(s) being sent.
9. Press **Send** to send the email message(s).

Note: Should you receive an Outlook error message about security, we suggest downloading and installing this free Outlook add-in: “Mapilab Advanced Security addin” from http://www.mapilab.com/outlook/security/

12.4. Sending SMS Messages to a Client or group of Clients

PowerPro RTO uses Esendex as a gateway to send SMS messages. Esendex provides a very reliable, fast, and affordable service. To set up your Esendex account please visit http://www.esendex.com.au and create an account.

Once your Esendex account has been created and activated, please enter the Esendex parameters into the Configuration> Application options> SMS section in PowerPro RTO:

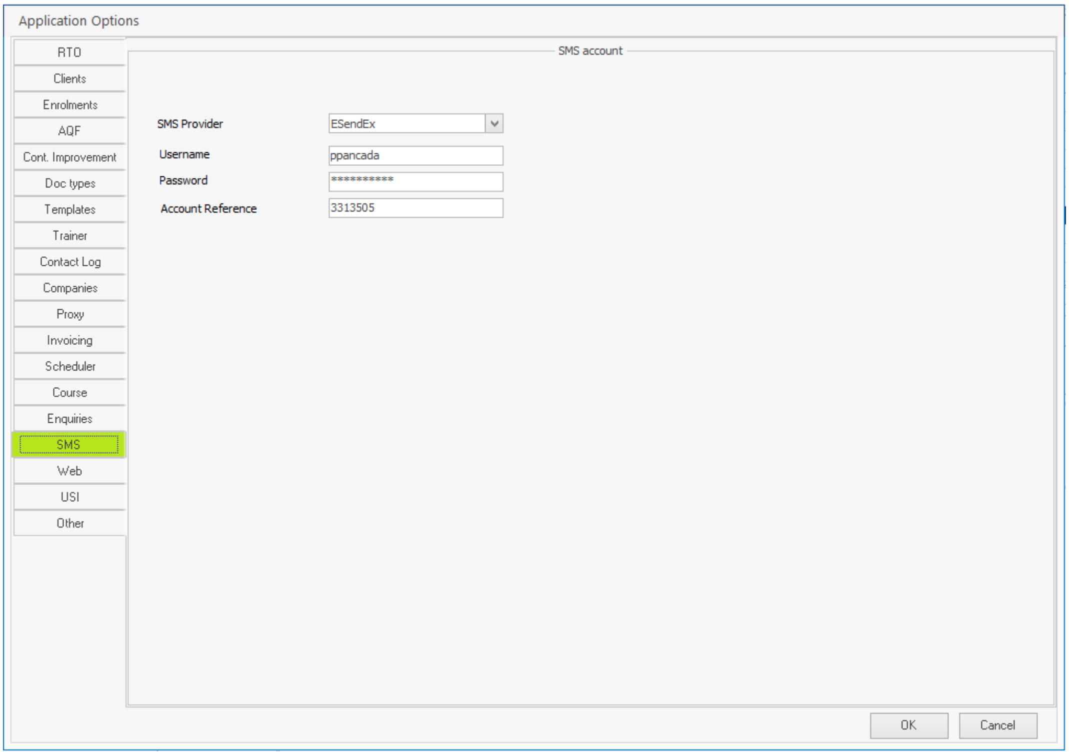


Figure above – Setting up the Esendex SMS account parameters in PowerPro RTO

Log off PowerPro and back again for the change to take effect.

If students have a mobile number listed on their client record, they can now be sent SMS's.

To SMS <u>multiple students</u> in a course:

1. Right-click on the course and choose the "SMS Clients…" option

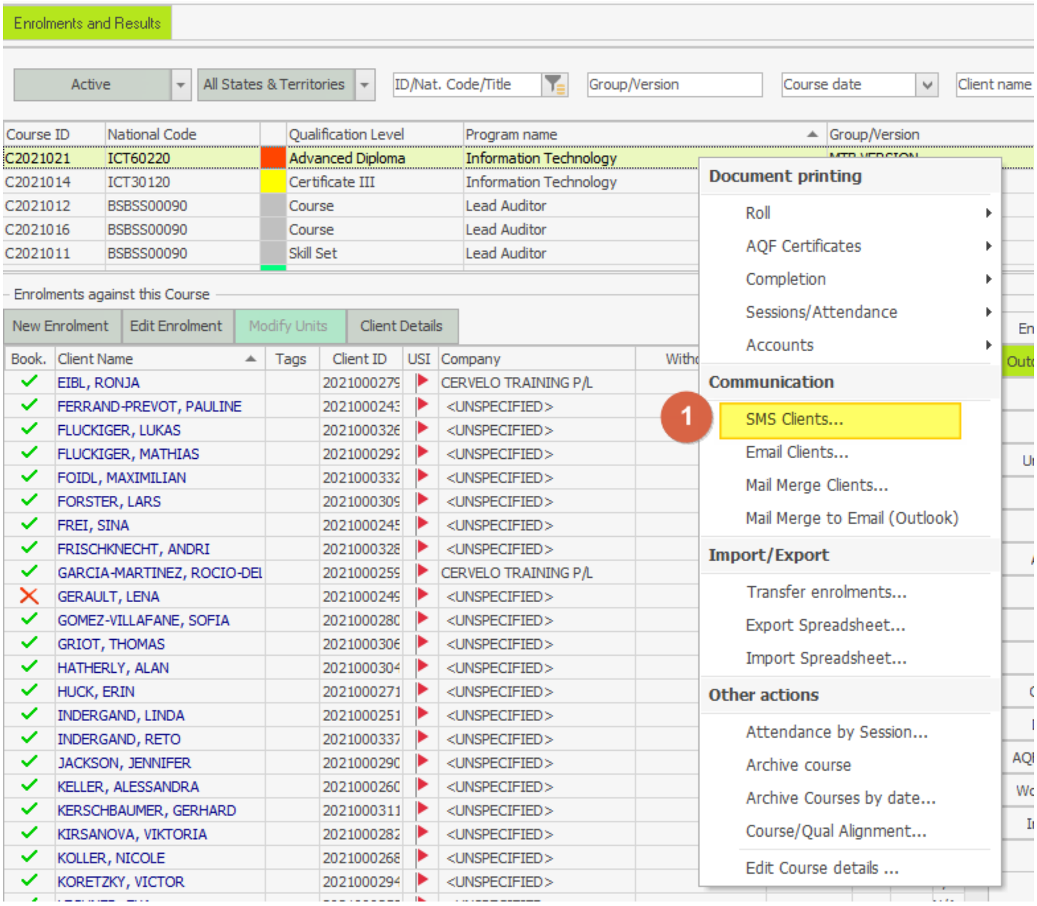
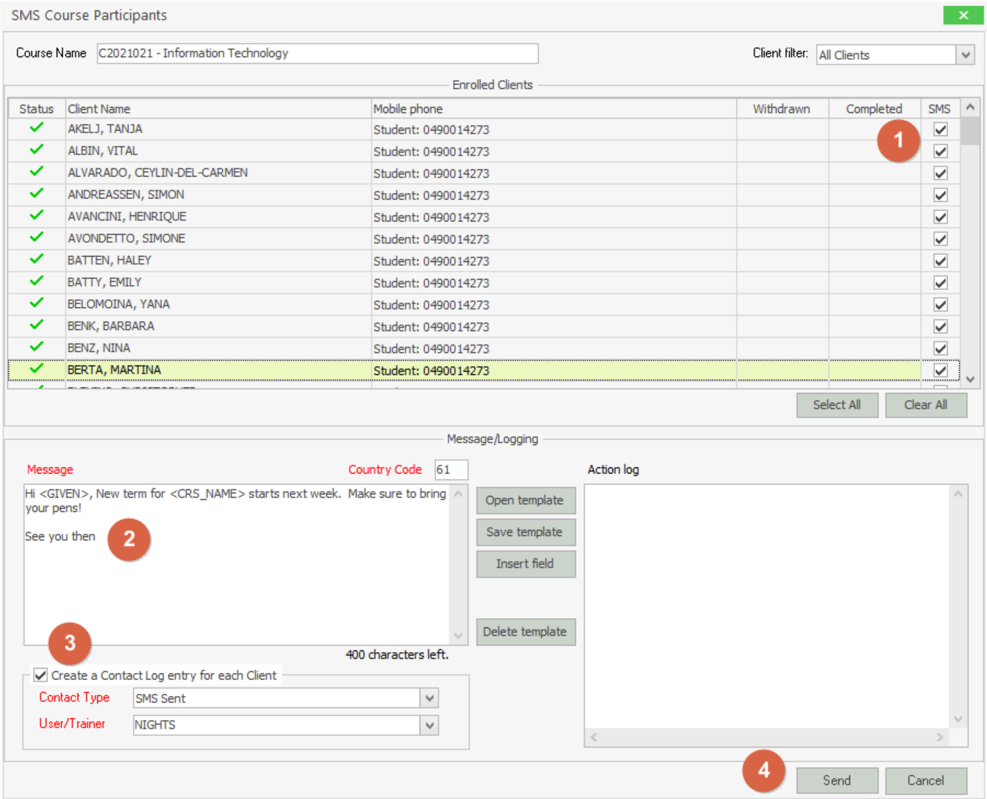


Figure above – Sending SMS to clients in a course

This brings up the SMS window:



■ **Figure above – Composing the SMS**

1. Use the **SMS** check boxes column to specify the SMS recipients.
2. Type in the message in the **Message** area.
3. Optionally choose to create a **Contact Log** – the contact log will contain a copy of the SMS message sent to the student.
4. Click on Send to send the SMS messages. The **Action Log** window will contain any relevant information returned from the SMS gateway which includes your current credit.

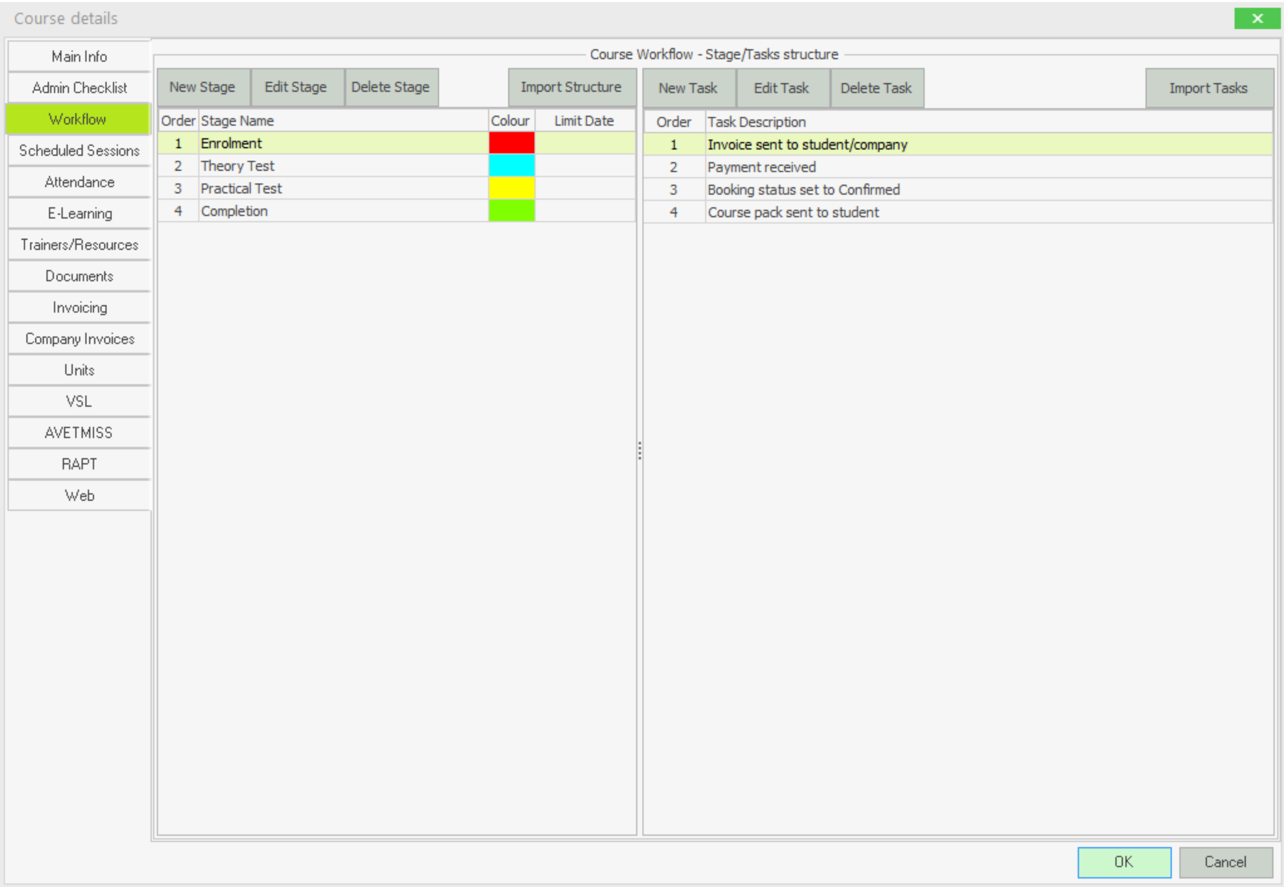
Note: You can compose SMS messages longer than the traditional 160 characters. In that case PowerPro will break it down in multiple parts and any recent mobile phone will display the multiple SMS message parts as one.

12.5. Using the Workflow/Check List Function

This function allows tracking student progress in the course from enrolment to completion using a pre-defined check list. The check list is defined at the course level and is made of different stages. Each stage is colour coded and can contain one or more tasks. Once all tasks are completed the stage is cleared.

To define a new Checklist or copy an existing one from another course please follow these steps:

1. Open the Course window (by double clicking on the course line from the Enrolments and results)
2. Select the **Workflow** tab.



■ **Figure above – Course Workflow definition**

3. Click on **New Stage** to define a new stage where you will enter the stage name and assign it with a colour.
4. Enter as many tasks (right side) as you find relevant tracking for that Stage.

Note: If needed, you can use the **Import structure** button to import an existing Workflow structure from another course.

Now all students in that course have that same checklist:

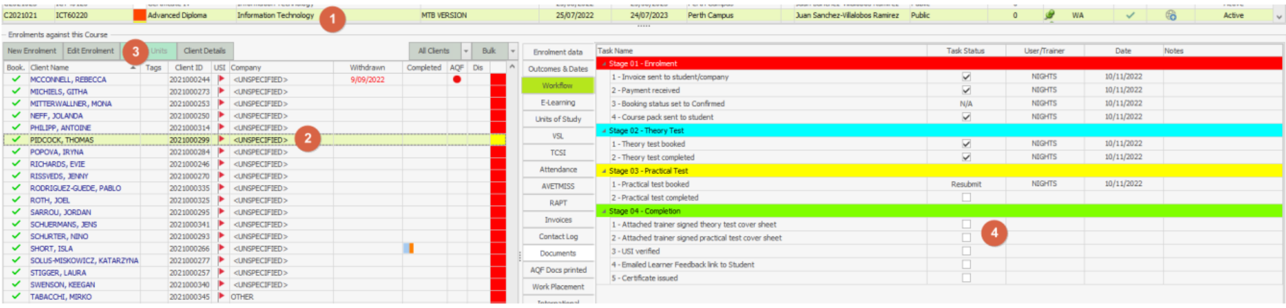


Figure above – Course workflow applied to a student

To modify tasks completed on a student checklist please follow these steps:

1. Highlight the relevant course (in Enrolments and results).
2. Highlight the relevant student within the course.
3. Click on **Edit Enrolment**.
4. Check the **Task Status** check boxes for the tasks the student has completed.
5. Press the **Save** button when done.

The student colour square will change automatically once you press the **Save** button. The colour indicates the current stage within the workflow structure. We suggest having the initial stage in red and the final stage in dark green.

Note: There are two reports which list the current Workflow Stage for each Client. These are:

- Course Reports>Course Stages

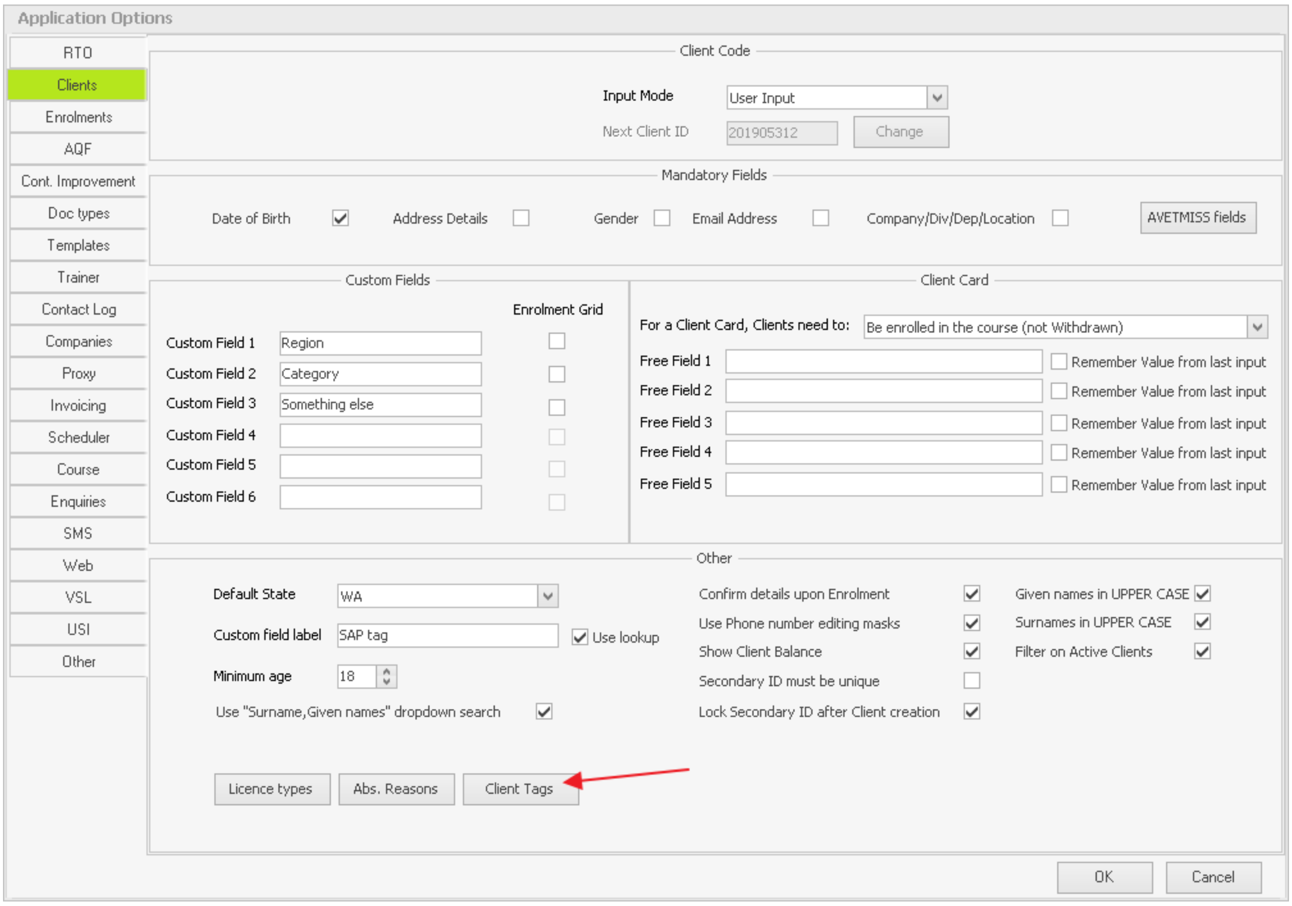
- Client Reports>Training Progress Report

12.6. Colour Coded Client Tags

Colour coded tags can assist identifying Client groups.
Create tags by associating a colour with a description. Examples of possible tags are: “International”, “Funded”, “Returning student”, “Fees outstanding”.

12.6.1. Setting up Client Tags

Open **Configuration**>**Application options**>**Client**>**Client Tags** to configure the different tags:



- **Figure above – Client tags setup button**

This opens a window where the different tags can be created. Each tag consists of a description, a colour, and a status (Active/Inactive flag). Use the "**+**" button to add a new tag:

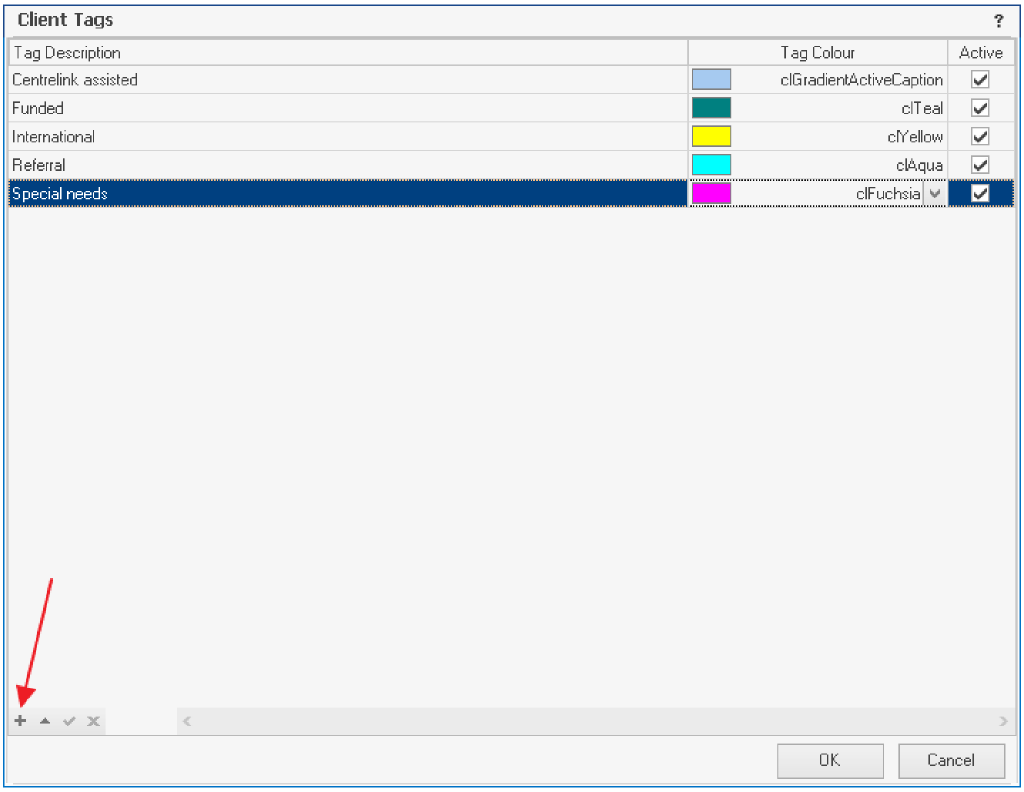


Figure above – Client tags window – note the + button used to create new tags

12.6.2. Assigning Tags to a Client

Once the tag list is configured, users can assign any active tag to clients. This is done by double clicking on the **Enrolments & Results** >**Tags** column:

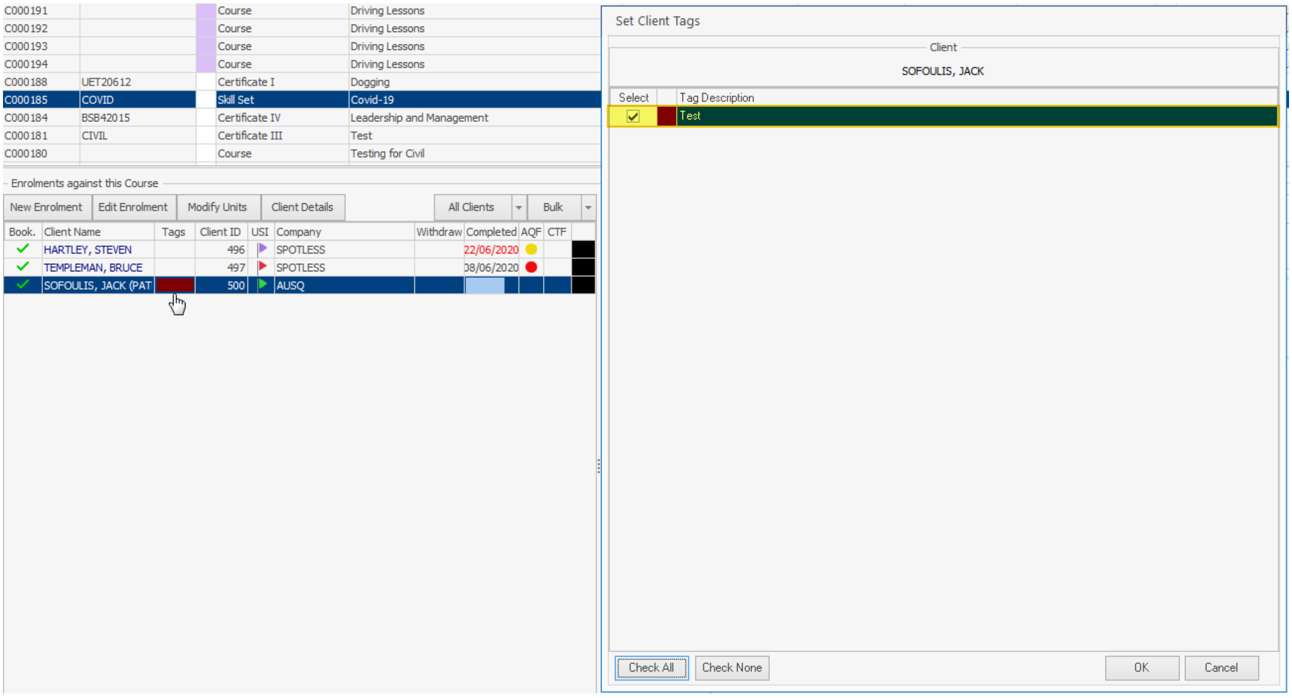


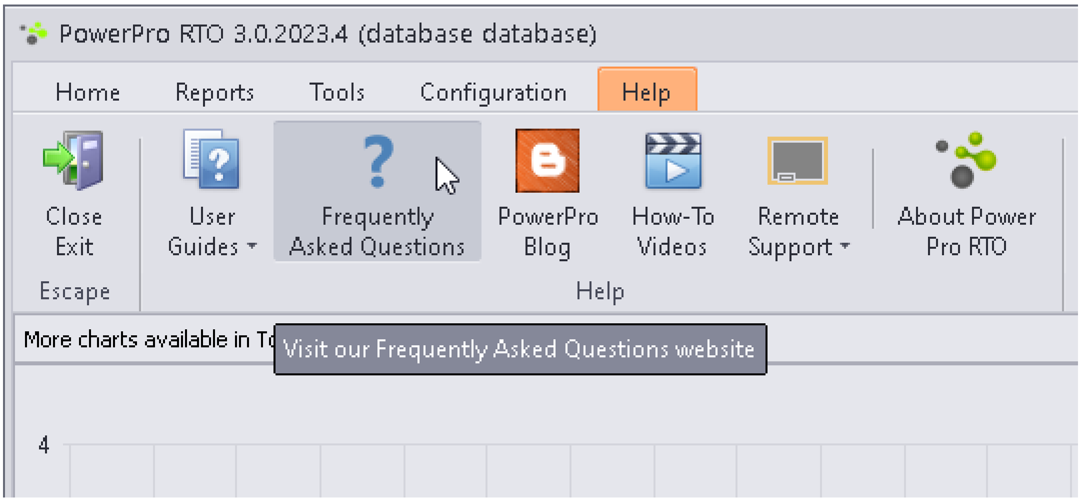
Figure above – Adding Tag(s) to a client

The **Tags** column (in Enrolments & Results) shows the different tags associated with a Client. Mouse hover the **Tags** column to see the description of the tags set for that Client.

13. Other References

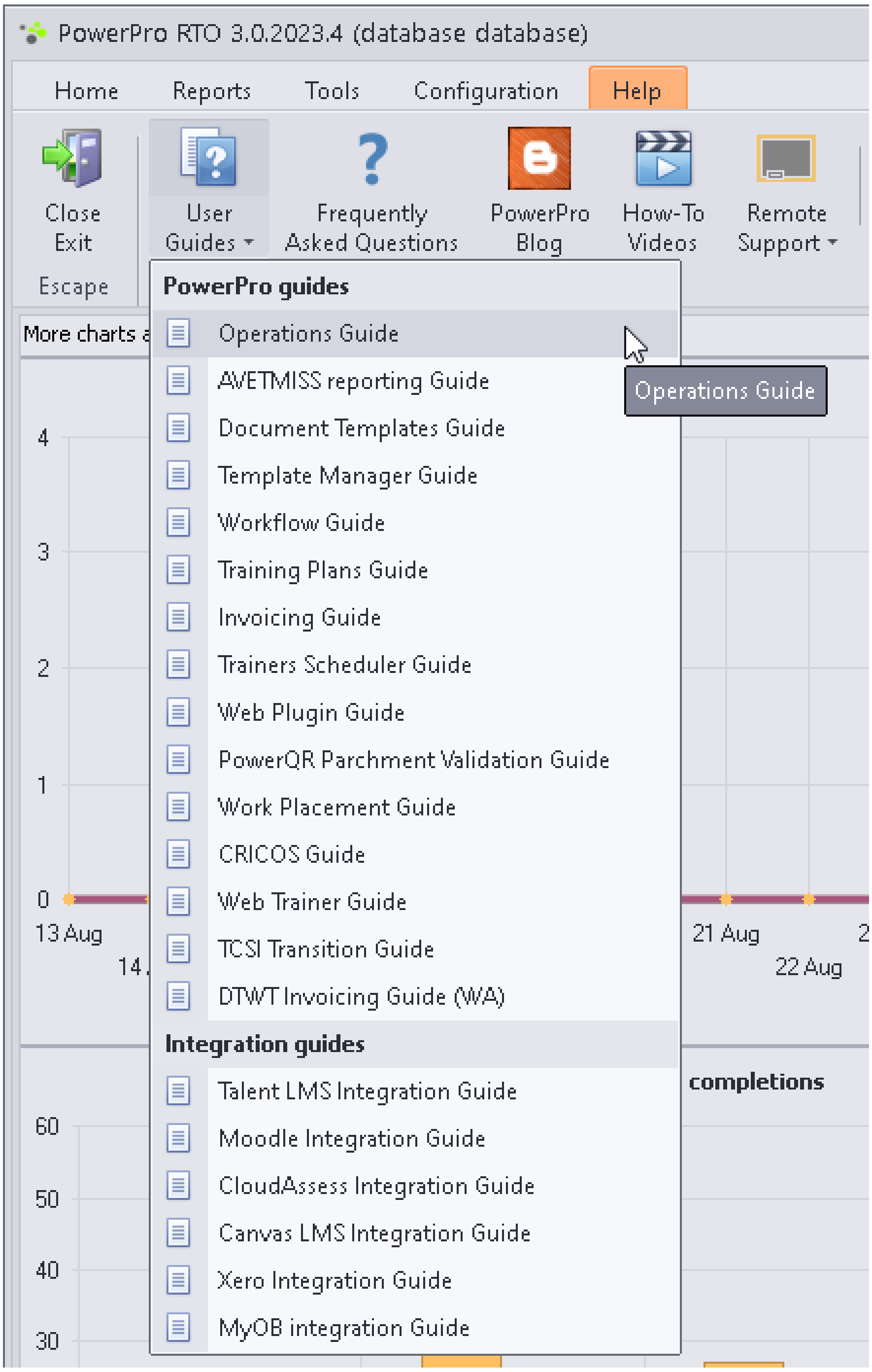
13.1. The PowerPro FAQ

The PowerPro FAQ is a valuable resource and must be mentioned here. It is available from our web site as well as from the Help menu in PowerPro:



13.2. Function specific User Guides

Additional User Guides are available from the PowerPro Help menu. Do not hesitate to open any of these guides should it be relevant to your organisation. This is the list of User Guides available at the time this document was written:


PowerPro RTO 3.0.2023.4 (database database)
Home
Reports
Tools
Configuration
Help
Close
Exit
Escape
User
Guides
Frequently
Asked Questions
PowerPro
Blog
How-To
Videos
Remote
Support
PowerPro guides
Operations Guide
AVETMISS reporting Guide
Document Templates Guide
Template Manager Guide
Workflow Guide
Training Plans Guide
Invoicing Guide
Trainers Scheduler Guide
Web Plugin Guide
PowerQR Parchment Validation Guide
Work Placement Guide
CRICOS Guide
Web Trainer Guide
TCSI Transition Guide
DTWT Invoicing Guide (WA)
Integration guides
Talent LMS Integration Guide
Moodle Integration Guide
CloudAssess Integration Guide
Canvas LMS Integration Guide
Xero Integration Guide
MyOB integration Guide
Operations Guide
completions