



FileTrak

FileTrak**3**

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1 FileTrak

1.1 Introduction

This extension allows you to store and retrieve documents and files relating to various aspects of your training activities, by linking to them directly from various VETtrak wizards.

Files can be stored:

- On your local computer or network
- On the internet
- In a separate document database (only available if you purchase the Document Database from OzSoft)

Some advantages and disadvantages of the different methods are listed below:

Files stored on local computer or network

Advantages:

- Files can be easily opened, edited and saved back to the same location.

Disadvantages:

- Files need to be maintained in their original locations. If any files or folders are moved or deleted, the links to the documents will be lost.

Files stored online or in document database

Advantages:

- All files kept together in a single location.
- Files will still be accessible even if the original is moved or deleted.
- Easy to keep and track multiple versions of the same file.

Disadvantages:

- Cannot open and save an edited file back to the same location; would need to save locally, edit and upload the file again.

The entities that can have documents associated with them are:

- | | | | |
|----------------------|------------------|-------------------|-----------------------|
| • Award* | • Event* | • Invoice | • Profile |
| • Booking | • Enrolled Unit | • Location | • Programme |
| • Class | • Enrolment | • Occurrence | • Programme Type |
| • Client | • Funding Model | • Occurrence Cost | • Purchasing Contract |
| • Contract | • Funding Source | • Organisation | • Qualification |
| • Education History* | • Group | • Payment | • Room |
| • Employer | • Inventory Item | • Placement | • Unit |

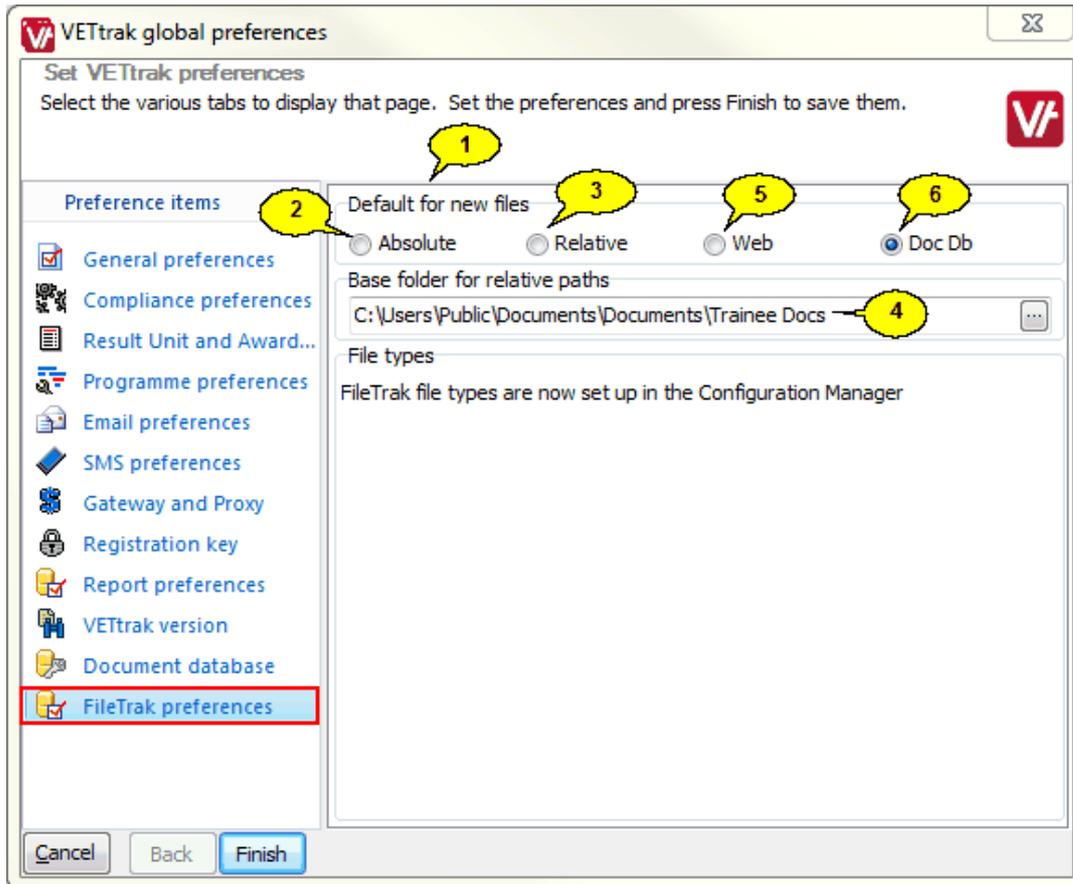
* These items already have the ability to link documents in the standard VETtrak product. FileTrak allows an extra linking option in these cases.

1.2 Setting Up FileTrak

Before using FileTrak, you need to set up some information about the types of files you will be storing, and where they will be stored.

1.2.1 Preferences

To set the location where files will be stored, go to **File > Global preferences** and select **FileTrak preferences** at the bottom of the list.

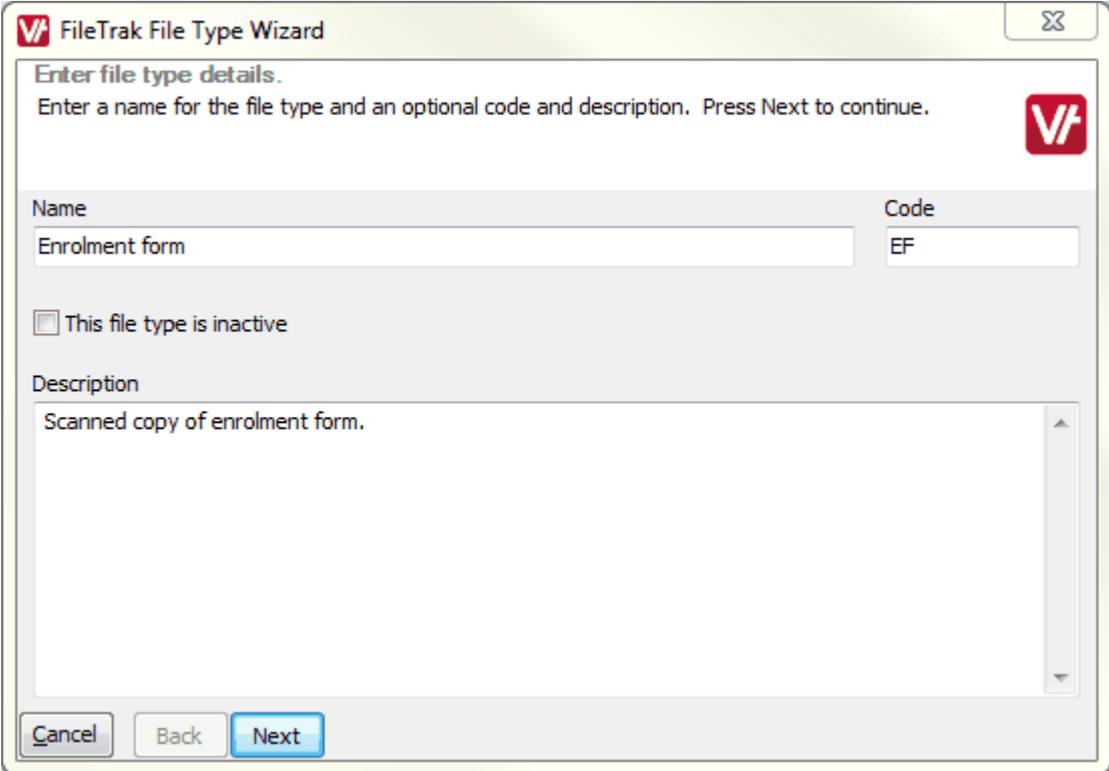


1. This section allows you to set the default setting for storing the path to your documents.
2. Choose **Absolute** if the files are always stored in the same place (such as a server), but may be accessed from different locations. This ensures that wherever you access VETtrak from, the path will always point directly to the location of the document.
3. Relative paths can be useful if you may want to move the location of your all files, but keep the same folder structure - such as if you want to move them from one server to another, or from a local computer to a server. In this case you set the path to the base folder containing the documents, and then, when linking individual documents, you only need to specify the rest of the path to the document within the folder specified here.
4. If you are using relative paths, set the path to the base folder here.
5. Select **Web** if the files are to be stored online somewhere.
6. Available only if you have purchased the Document Database from OzSoft. If you select this option, a copy of the file will be stored in, and retrieved from, a separate document database. **NOTE:** You must [set up the connection to the document database](#) for this feature to work.

1.2.2 File Types

In the Configuration Manager, there is a **Filetrak file types** node where you can set up the different types of files that you want to upload. These may be things such as enrolment forms, identification or receipts.

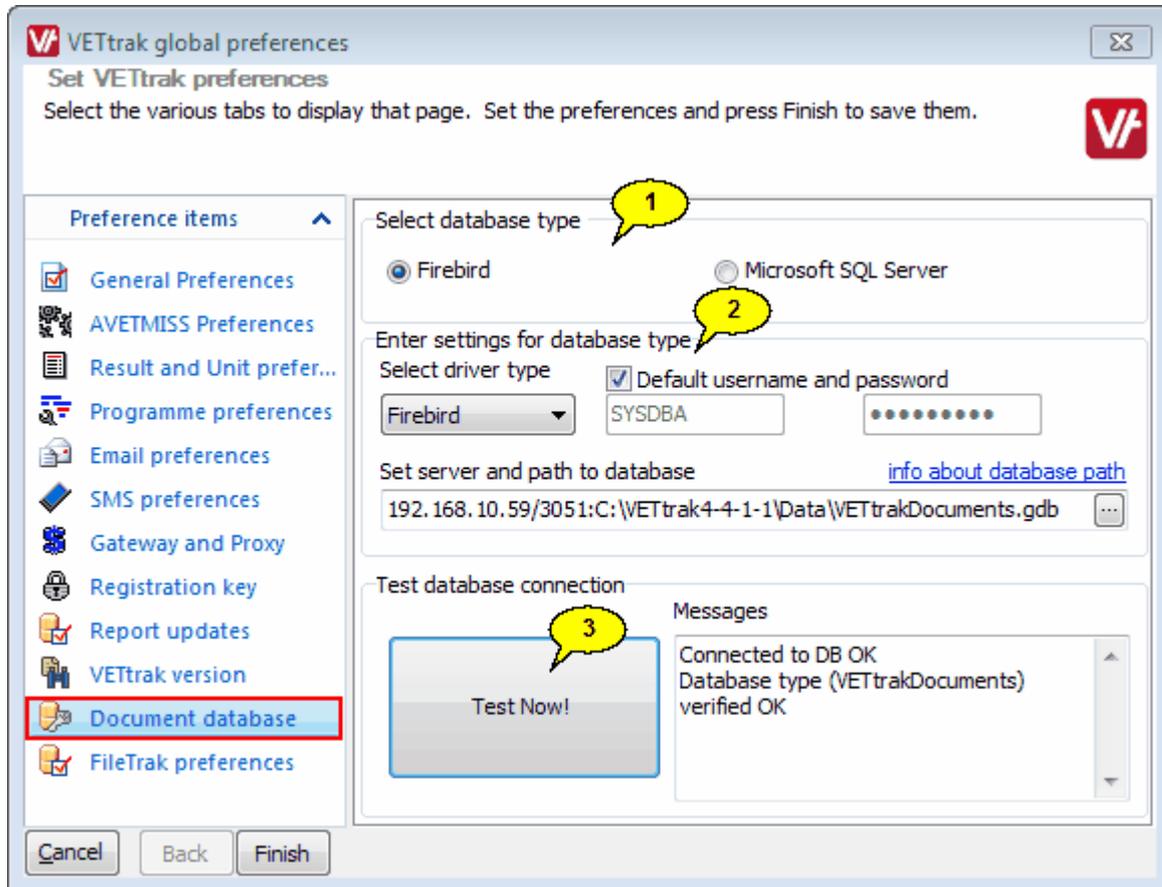
Note that there are three system-managed file types already set up in your database. These are required if you are using the Student Portal or Trainer Portal, and cannot be deleted or modified.



The screenshot shows a dialog box titled "FileTrak File Type Wizard". The main heading is "Enter file type details." followed by the instruction "Enter a name for the file type and an optional code and description. Press Next to continue." There is a FileTrak logo in the top right corner of the dialog. Below the heading, there are two input fields: "Name" with the text "Enrolment form" and "Code" with the text "EF". Below these fields is a checkbox labeled "This file type is inactive" which is currently unchecked. Below the checkbox is a "Description" text area containing the text "Scanned copy of enrolment form.". At the bottom of the dialog, there are three buttons: "Cancel", "Back", and "Next". The "Next" button is highlighted in blue.

1.3 Setting Up the Document Database

This section only applies if you have purchased the Document Database, which allows you to store all of your files in a single database location. Before you can use this feature, you need to complete the settings here so that VETtrak can access the database. Go to **File > Global preferences** and select **Document database**.



1. Select the type of database you are using for your document database.
2. Enter the connection information for the database.
3. Click **Test Now!** to test the connection to the database.

1.4 Linking to Your Documents & Files

Documents can be linked via any wizard that has the document icon in the bottom right-hand corner. Click this button to open the Document Linking Wizard.

NOTE: This button is only available when editing an item. It will not appear in the wizard when you are adding a new item with that wizard. If you want to link a document to something that you are newly creating, you will first need to continue through the wizard to save the item, and then edit the item to open the wizard again and link the document.

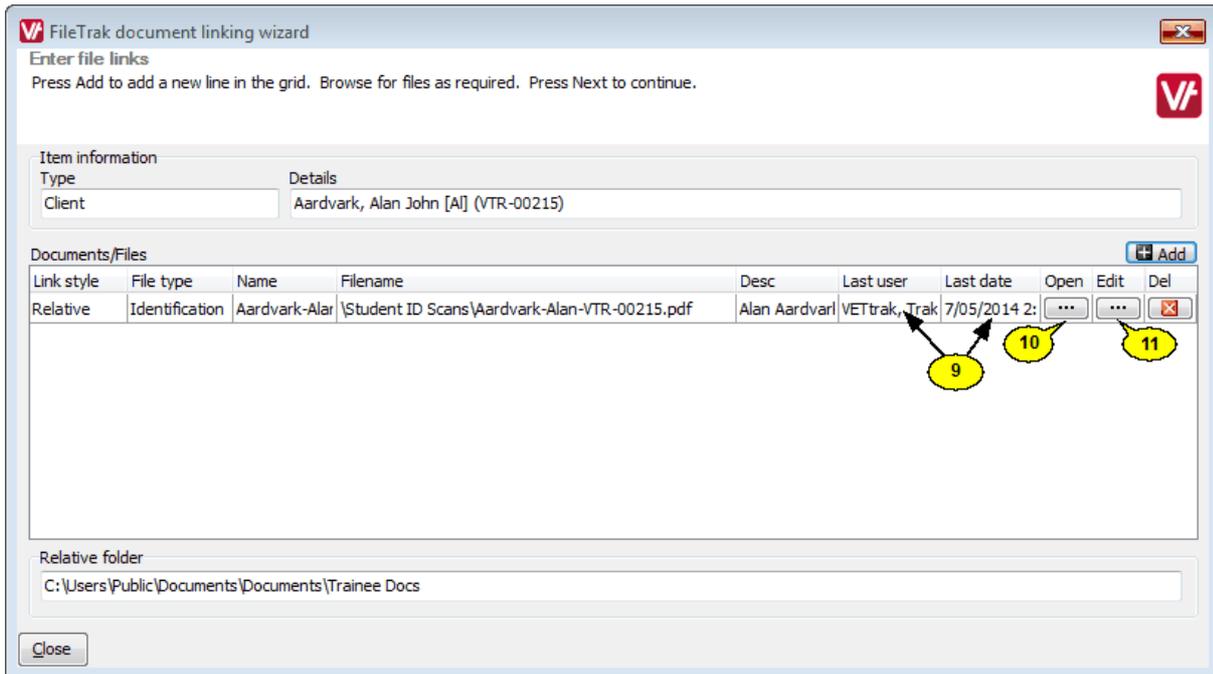
1. These fields are for information only and cannot be changed.
2. Click the **Add** button to link a new document. The File Link Wizette will open.

The screenshot shows the 'File Link Wizette' dialog box. It has a title bar with the VETtrak logo and a close button. The main area is titled 'Add/Edit file link' and contains the following fields:

- Link style:** A dropdown menu set to 'Relative' (callout 3).
- File type:** A dropdown menu set to 'Identification' (callout 4).
- File location and name/URL:** A text field containing '\\Student ID Scans\\Aardvark-Alan-VTR-00215.pdf' and a browse button (callout 5).
- Name:** A text field containing 'Aardvark-Alan-VTR-00215.pdf' (callout 6).
- Description:** A text field containing 'Alan Aardvark Driver's Licence' (callout 7).

At the bottom, there are two buttons: 'Cancel' and 'Finish' (callout 8).

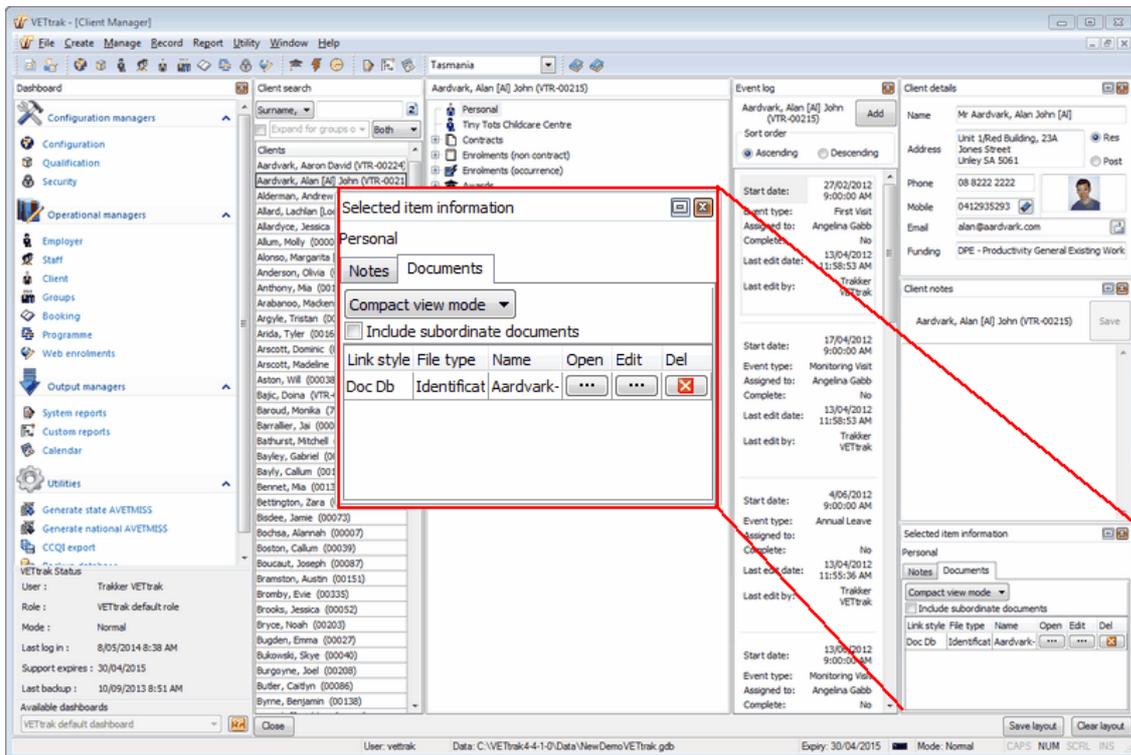
3. Select the type of file path. This will default to the type set in the [Global Preferences Wizard](#) ⁴, but can be changed if necessary.
4. Select what kind of file you are linking. In this case we are linking a scan of the client's identification document to their client profile.
5. Click the button and navigate to the location of the file.
6. The name will be automatically filled in with the name of the document you are linking, or you can type over it to enter a name of your choice.
7. Optionally, you can add notes about this document.
8. Click **Finish**.



9. The information in these fields cannot be changed - this information is saved automatically for audit purposes.
10. Later, when you want to access the document you have linked, click the **Open** button to open it.
11. Click the **Edit** button to make changes to the file information. Note that this button is **not** for editing the document itself. To edit a linked document, you would need to first open it using the **Open** button.

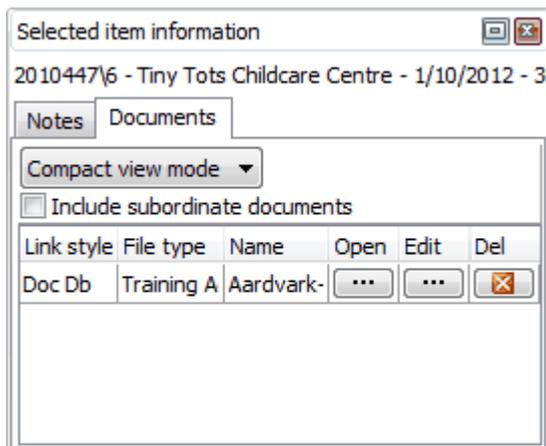
1.5 Viewing the Documents Grid

In the Client, Employer, Staff, and Programme Managers, a grid has been added to the Notes panel to display all the documents associated with whichever item you have clicked on.

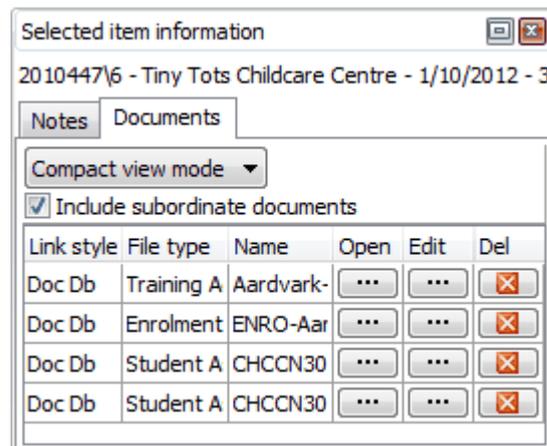


The grid has a tickbox to ***Include subordinate documents***. If this is left unticked, the document grid will show only documents relating to the item you have currently clicked on. If it is ticked, documents relating to anything under the selected item in the tree will also be included.

Below are examples of what we might see in the document grid when we click on a client's contract, showing the grid both with and without subordinates included.



When ***Include subordinate*** is not ticked, we only see documents relating directly to the contract.



When ***Include subordinate*** is ticked, we also see documents relating to the enrolment and units underneath that contract.

It is possible to drag this panel elsewhere on the screen and dock it at whichever edge of the screen you prefer. For example, dragging it into the centre panel and docking it against the bottom edge of the screen gives more room to see the grid and make use of the different viewing modes available.

Client search

Expand for groups: Both

Clients

- Aardvark, Aaron David (VTR-00224)
- Aardvark, Alan [A] John (VTR-00215)
- Alderman, Andrew (00231)
- Allard, Lachlan [Lockie] (00024)
- Allardyce, Jessica (00088)
- Allum, Molly (00005)
- Alonso, Margarita [Marge] Luisa (VT)
- Anderson, Olivia (00036)
- Anthony, Mia (00197)
- Arabano, Mackenzie (00112)
- Argyle, Tristan (00009)
- Arida, Tyler (00163)
- Arscott, Dominic (00029)
- Arscott, Madeline (00196)
- Ash, Will (00038)
- Bajic, Doina (VTR-00266)
- Baroud, Monika (72787)
- Barraller, Jai (00033)
- Bathurst, Mitchell (00114)
- Bayley, Gabriel (00123)
- Bayly, Callum (00117)
- Bennet, Mia (00130)
- Bettington, Zara (00150)
- Bisdee, Jamie (00073)
- Bochsa, Alannah (00007)
- Boston, Callum (00039)
- Boucaut, Joseph (00087)
- Bramston, Austin (00151)
- Bromby, Evie (00335)
- Brooks, Jessica (00052)
- Bryce, Noah (00203)
- Bugden, Emma (00027)
- Bukowski, Skye (00040)
- Burroughs, Joel (00208)

Aardvark, Alan [A] John (VTR-00215)

- Personal
- Tiny Tots Childcare Centre
- Contracts
- 20104476 - Tiny Tots Childcare Centre - 1/10/2012 - 30/09/2013 - (CHC20108) Certificate II in
- Enrolments (non contract)
- Enrolments (occurrence)
- Awards
- Education history
- Invoices
- Invoices (as item)
- Groups
- Classes
- Attributes
- Events (all)
- Placements (all)
- Sent email
- Sent SMS
- Waitlisted programmes
- Units/Modules completed
- Units/Modules not completed

Event log

Aardvark, Alan [A] John (VTR-00215) Add

Sort order: Ascending Descending

- Start date: 27/02/2012 9:00:00 AM
- Event type: First Visit
- Assigned to: Angelina Gabb
- Complete: No
- Last edit date: 13/04/2012 11:58:53 AM
- Last edit by: Trakker VETtrak

- Start date: 17/04/2012 9:00:00 AM
- Event type: Monitoring Visit
- Assigned to: Angelina Gabb
- Complete: No
- Last edit date: 13/04/2012 11:58:53 AM
- Last edit by: Trakker VETtrak

- Start date: 4/06/2012 9:00:00 AM
- Event type: Annual Leave
- Assigned to:
- Complete: No
- Last edit date: 13/04/2012 11:55:36 AM
- Last edit by: Trakker VETtrak

- Start date: 13/06/2012 9:00:00 AM

Client details

Name: Mr Aardvark, Alan John [A]

Address: Unit 1/Red Building, 23A Jones Street, Unley SA 5061

Phone: 08 8222 2222

Email: alan@aardvark.com

Funding: DPE - Productivity General Existing Work

Client notes

Aardvark, Alan [A] John (VTR-00215) Save

Selected item information

20104476 - Tiny Tots Childcare Centre - 1/10/2012 - 3

Notes Documents

Compact view mode

Include subordinate documents

| Link style | File type | Name | Open | Edit | Del |
|------------|------------|-----------|------|------|-----|
| Doc Db | Training A | Aardvark: | ... | ... | ✖ |
| Doc Db | Enrolment | ENRO-Aar | ... | ... | ✖ |
| Doc Db | Student A | CHCCN30 | ... | ... | ✖ |
| Doc Db | Student A | CHCCN30 | ... | ... | ✖ |

Save layout Clear layout

User: vettrak Data: C:\VETtrak4-4-1-0\Data\NewDemoVETtrak.gdb Expiry: 30/04/2015 Mode: Normal CAPS NUM SCRL INS

There are three different viewing modes available, depending on how much information you want to be able to see:

Compact view just shows the basic details:

Selected item information

20104476 - Tiny Tots Childcare Centre - 1/10/2012 - 30/09/2013 - (CHC20108) Certificate II in Community Services (Child Care)

Notes Documents

Compact view mode Include subordinate documents

| Link style | File type | Name | Open | Edit | Del |
|------------|---------------------|---------------------------------|------|------|-----|
| Doc Db | Training Agreement | Aardvark-Alan-2010447-6.pdf | ... | ... | ✖ |
| Doc Db | Enrolment Form | ENRO-Aardvark-AlanVTR-00215.pdf | ... | ... | ✖ |
| Doc Db | Student Assignments | CHCCN301A-VTR-00215-1 | ... | ... | ✖ |
| Doc Db | Student Assignments | CHCCN301A-VTR-00215-1A | ... | ... | ✖ |

Medium view shows most of the information about each file, excluding the description:

Selected item information

20104476 - Tiny Tots Childcare Centre - 1/10/2012 - 30/09/2013 - (CHC20108) Certificate II in Community Services (Child Care)

Notes Documents

Medium view mode Include subordinate documents

| Link style | File type | Name | Filename | Desc | Last user | Last date | Open | Edit | Del |
|------------|------------------|---------------------------------|---|------------------|------------------|-------------------|------|------|-----|
| Doc Db | Training Agreeem | Aardvark-Alan-2010447-6.pdf | C:\Users\Public\Documents\Documents\Trainee Docs\Contracts\Aardvark-Alan-2010447-6.pdf | | VETtrak, Trakker | 8/05/2014 2:10: | ... | ... | ✖ |
| Doc Db | Enrolment Form | ENRO-Aardvark-AlanVTR-00215.pdf | C:\Users\Public\Documents\Documents\Trainee Docs\Enrolment Form\ENRO-Aardvark-AlanVTR-00215.pdf | | VETtrak, Trakker | 8/05/2014 2:12: | ... | ... | ✖ |
| Doc Db | Student Assignm | CHCCN301A-VTR-00215-1 | C:\Users\Public\Documents\Documents\Trainee Docs\Assignments\CHCCN301A-VTR-00215-1 | | VETtrak, Trakker | 8/05/2014 9:53: | ... | ... | ✖ |
| Doc Db | Student Assignm | CHCCN301A-VTR-00215-1A | C:\Users\Public\Documents\Documents\Trainee Docs\Assignments\CHCCN301A-VTR-00215-1A | More details add | VETtrak, Trakker | 12/05/2014 10:00: | ... | ... | ✖ |

Large view is most useful if you are including subordinate documents in your grid view. It shows all information relating to each file, including indicating which item each document is attached to.

Selected item information

20104476 - Tiny Tots Childcare Centre - 1/10/2012 - 30/09/2013 - (CHC20108) Certificate II in Community Services (Child Care)

Notes Documents

Large view mode Include subordinate documents

| Entity | Description | Link style | File type | Name | Filename | Desc | Last user | Last date | Open | Edit | Del |
|--------------|--|------------|----------------|---------------------------------|---|------------------|---------------|-------------------|------|------|-----|
| Contract | Aardvark, Alan John (1/10/2012-30/09/2013) | Doc Db | Training Agree | Aardvark-Alan-2010447-6.pdf | C:\Users\Public\Documents\Documents\Trainee Docs\Contracts\Aardvark-Alan-2010447-6.pdf | | VETtrak, Tral | 8/05/2014 2:10: | ... | ... | ✖ |
| Enrolment | ENRO-Aardvark-AlanVTR-00215.pdf | Doc Db | Enrolment Fo | ENRO-Aardvark-AlanVTR-00215.pdf | C:\Users\Public\Documents\Documents\Trainee Docs\Enrolment Form\ENRO-Aardvark-AlanVTR-00215.pdf | | VETtrak, Tral | 8/05/2014 2:12: | ... | ... | ✖ |
| Enrolled uni | CHCCN301A - Aardvark-AlanVTR-00215-1 | Doc Db | Student Assig | CHCCN301A-VTR-00215-1 | C:\Users\Public\Documents\Documents\Trainee Docs\Assignments\CHCCN301A-VTR-00215-1 | | VETtrak, Tral | 8/05/2014 9:53: | ... | ... | ✖ |
| Enrolled uni | CHCCN301A - Aardvark-AlanVTR-00215-1A | Doc Db | Student Assig | CHCCN301A-VTR-00215-1A | C:\Users\Public\Documents\Documents\Trainee Docs\Assignments\CHCCN301A-VTR-00215-1A | More details add | VETtrak, Tral | 12/05/2014 10:00: | ... | ... | ✖ |

1.6 Example - Linking an Enrolment Form to an Enrolment

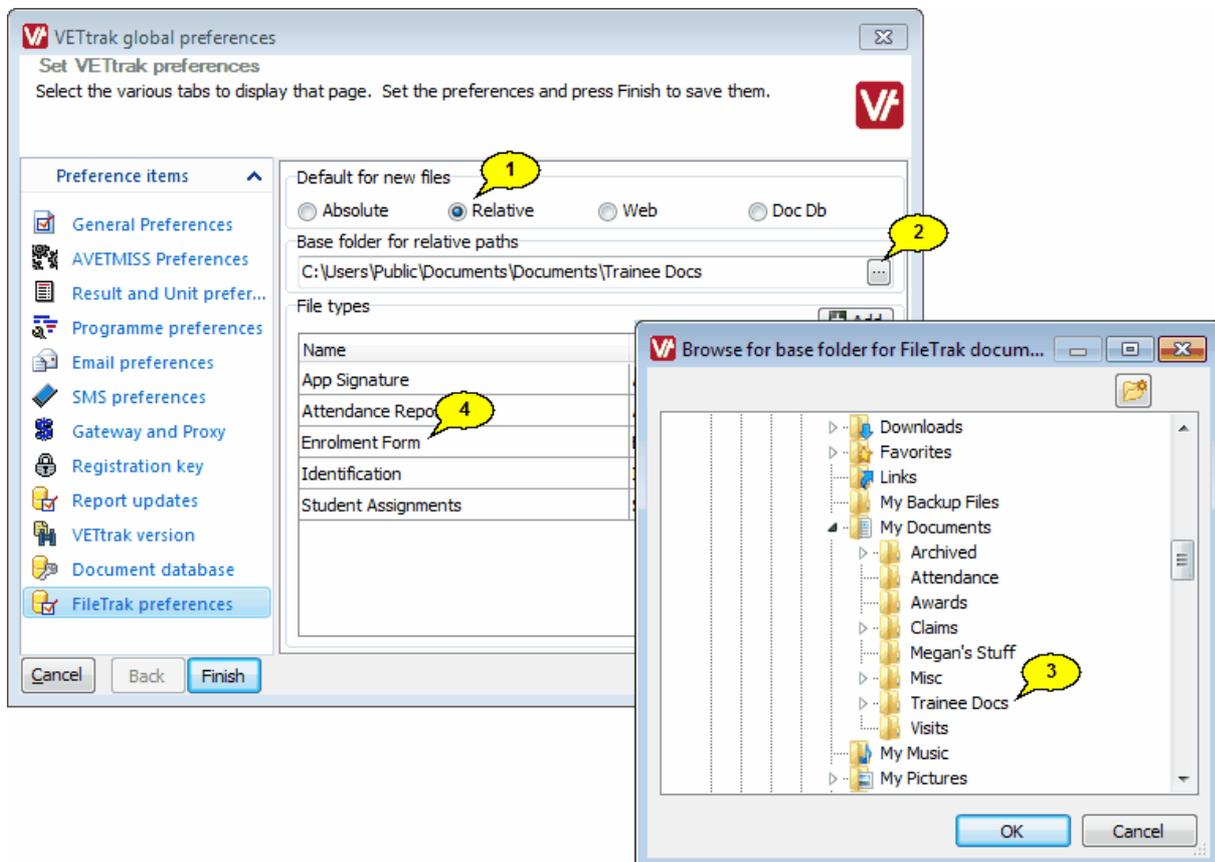
For this example, we will use the following scenario:

- We have PDF scans of physical enrolment forms that our clients have filled out, and we want to link these to each client's enrolment.
- We are a small RTO with all our files currently stored on a single computer, but plan to expand our IT infrastructure soon and store our files on a server, where they can be accessed from multiple computers.
- We are currently storing the files on our computer in the My Documents area, under a folder called "Trainee Docs".

Step 1 - Configure FileTrak

Open the FileTrak preferences under **File > Global preferences**.

As we know we will be moving the files in the near future, we want to use the relative path to the "Trainee Docs" folder where we are storing all our files. This will allow us to still access our files even if we pick up the Trainee Docs folder and move it to a different location.



1. Select **Relative**...
2. ...click this button...
3. ...and navigate to the folder where your documents are currently stored. **NOTE:** When we later move our files to a server, we will need to come back to this wizard and change this base folder.
4. Make sure you have set up the Enrolment Form as one of the types of documents you will be wanting to link.

Step 2 - Link the Document

To link the enrolment form to your client's enrolment, find the client in the Client Manager, right-click on their enrolment, and select **Edit enrolment**. Then click the document icon at the bottom of the Enrolment Wizard.

Enrolment Wizard : Aardvark, Alan John (00412)

Enter details.
Set the start and finish dates and the location of the enrolment. Select a qualification or course from the list (optional). Press Next to continue.

State rules in effect : Victoria State Reportable Enrolment

Start date: 1/08/2015 | Finish date: 31/07/2016 | Location: Melbourne (3000) | Reportability options: Report to state body, Report to national body (NCVER), Do not report this enrolment

Organisation: VTA - VETtrak Academy | Division: Root division

Select contract to attach enrolment to (optional) Use last contract(s) [Clear]

Training package qualifications Show courses in list [Order] [Clear]
BSB20107 - Certificate II in Business

Enrolment status: Active (Commencement) | Date of status change: 1/08/2015 | Cancellation reason: [Clear]

Description: [Text Area]

[Cancel] [Back] [Next] [Document Icon]

FileTrak document linking wizard

Enter file links
Press Add to add a new line in the grid. Browse for files as required. Press Next to continue.

Item information
Type: Enrolment (Contract and Non-contract) | Details: 1/08/2015-31/07/2016 BSB20107 - Certificate II in Business

| Link style | File type | Name | Filename | Last date | Open | Edit | Del |
|------------|-----------|------|----------|-----------|------|------|-----|
| | | | | | | | |

Relative folder: C:\Users\Public\Documents\Documents\Trainee Docs

[Close] [Add]

File Link Wizette

Add/Edit file link
Select the link style, file type and complete file name/URL (include file path where appropriate).

Link style: Relative (2) | File type: Enrolment Form (3)

File location and name/URL: "Enrolment Forms\ENRO-Aardvark-AlanVTR-00215.pdf" (4) (5)

Name: ENRO-Aardvark-AlanVTR-00215.pdf (6)

Description: [Text Area]

[Cancel] [Finish] (7)

1. Click the **Add** button to open the File Link Wizette.

-
2. Leave the Link Style as **Relative**, as per our settings above.
 3. Select the Enrolment Form file type.
 4. Navigate to the location where you have stored their form. In this case we have all enrolments stored in a sub-folder of Trainee Docs, called Enrolment Forms.
 5. Note that as we are using relative paths, only the last part of the path to the document is stored. This means that if we later move all of our trainee documents to another location, we just need to go back to the FileTrak Configuration Wizard and change the base path. As long as the same folder structure is used, all files should then be accessible in the new location.
 6. The name of the file will be automatically filled in here, but you can change it to something else if you want.
 7. Click **Finish**.

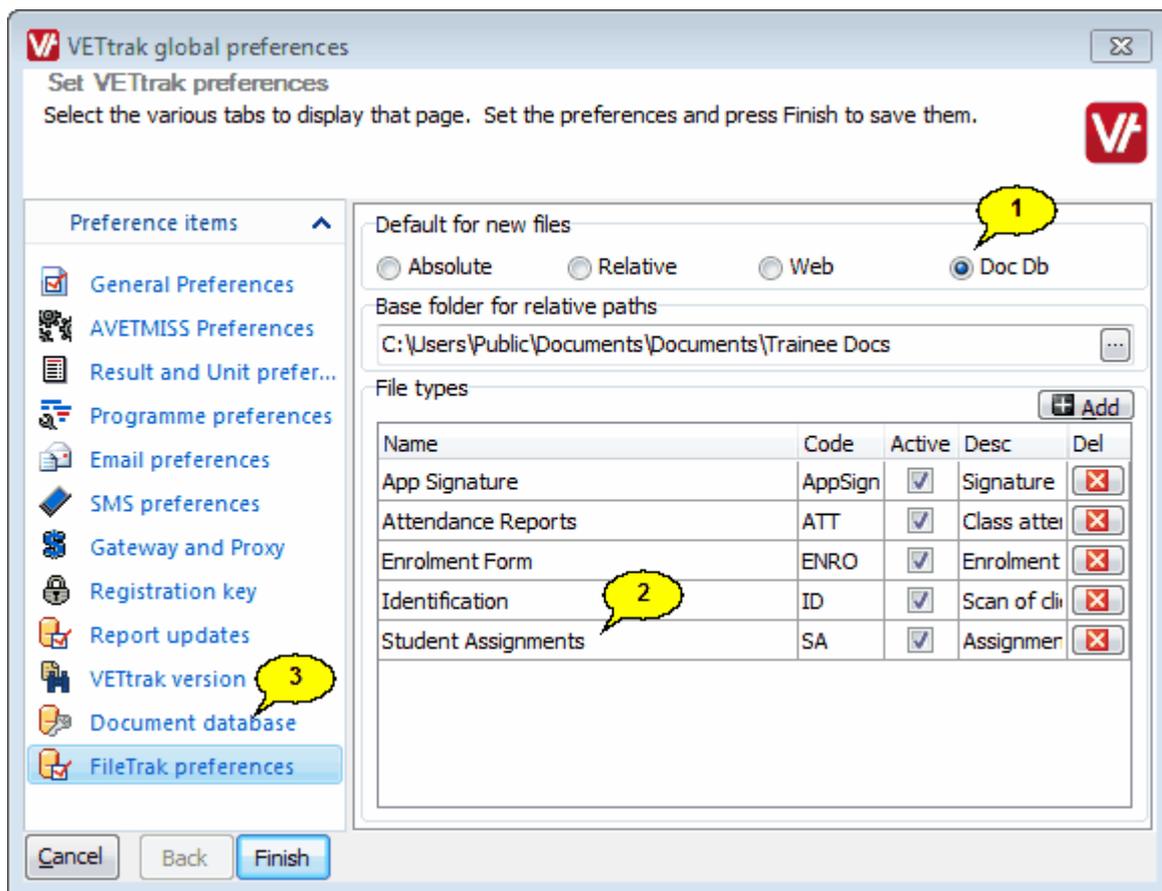
1.7 Example - Saving a File in the Document Database

If you prefer to store all your documents in a single location, you can purchase the Document Database feature. This allows you to store all of your files in a database, separate to the main VETtrak database. This means that a separate copy of the file will be created and stored, which will remain available even if the original document is deleted.

In this scenario, we are wanting to store copies of all student assignments in a database. If students are asked to resubmit an assignment, we want to be able to track this, so we want to store the different versions of the assignment.

Step 1 - Configure FileTrak

Open the FileTrak preferences under **File > Global preferences**.

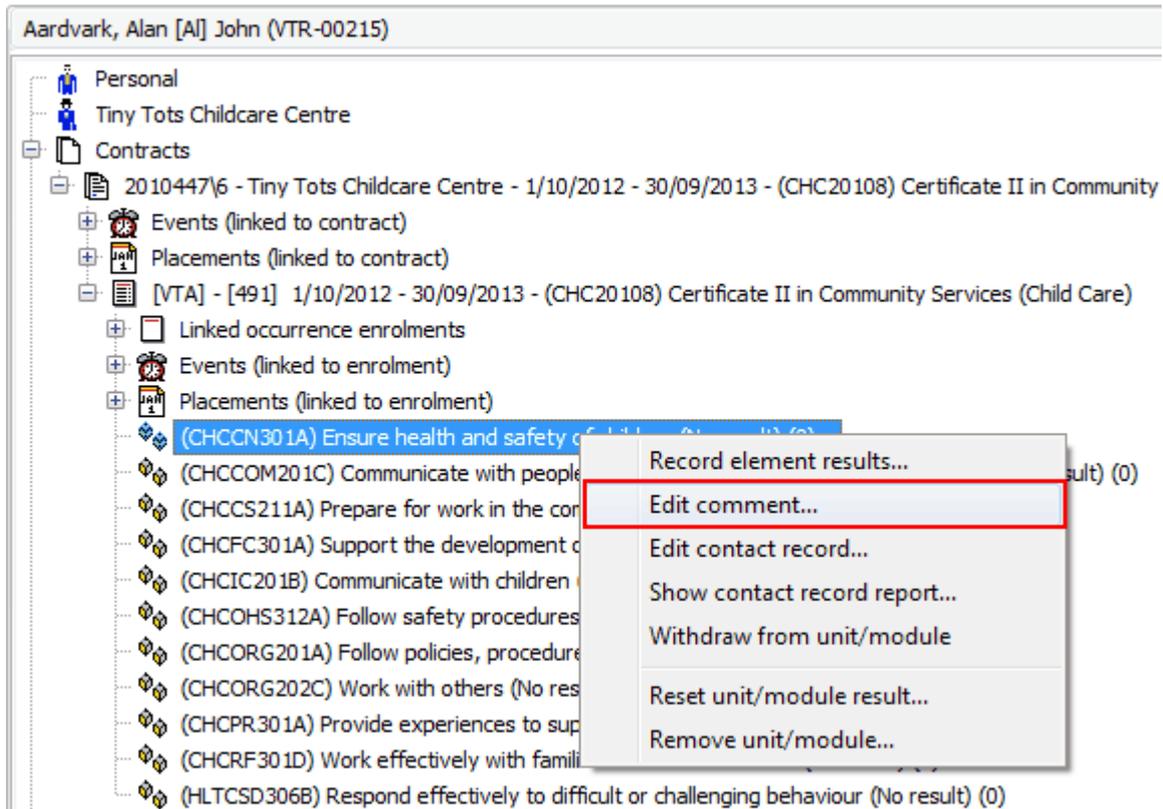


1. Select **Doc Db**.
2. Make sure you have set up Student Assignments as one of the types of documents you will be wanting to link.
3. Go to the Document Database section and [set up the database](#).

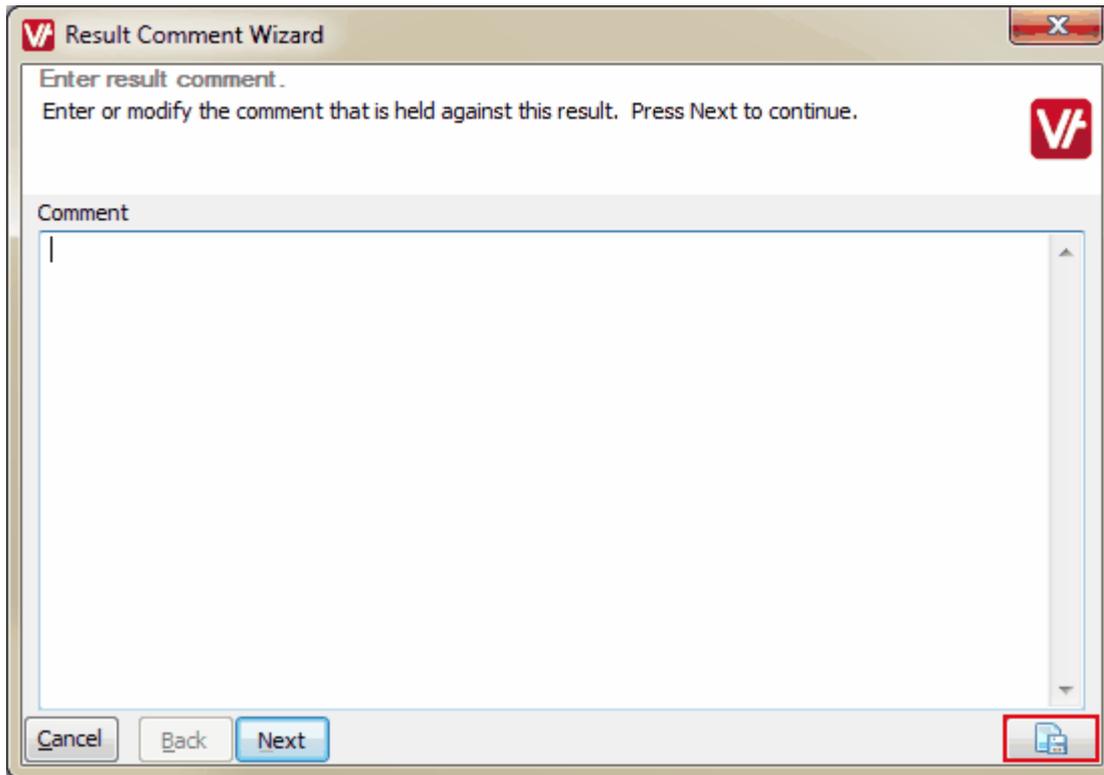
Step 2 - Upload the Documents

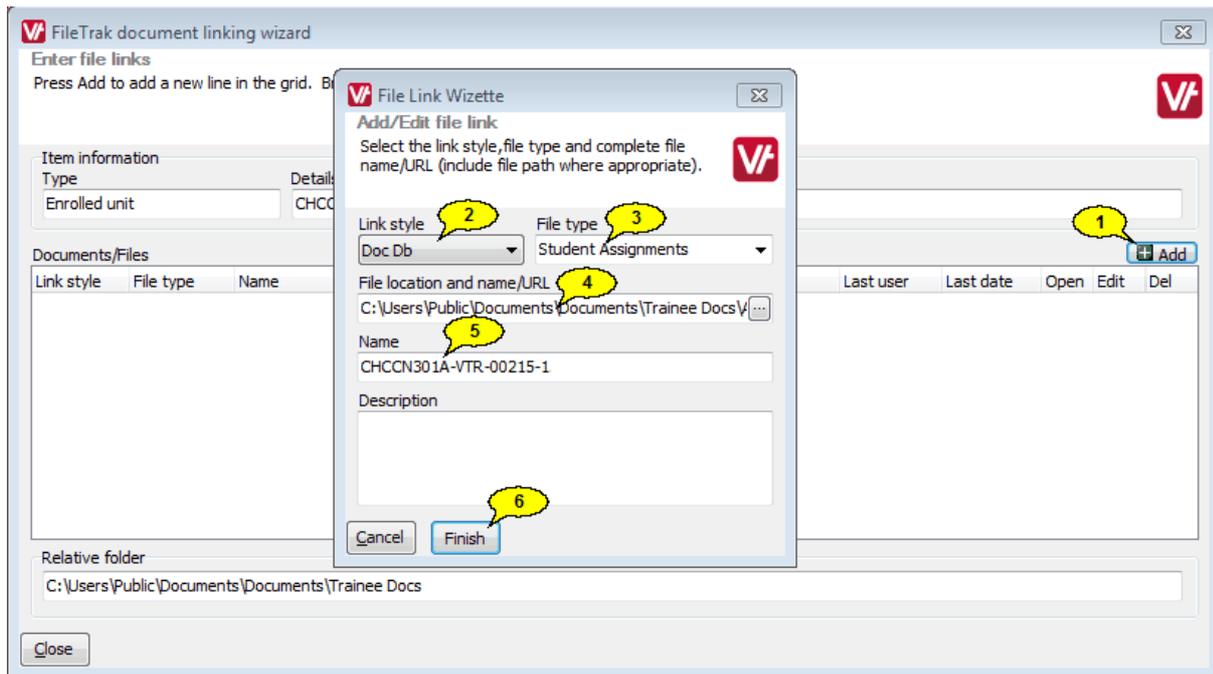
We want to store the assignments against the enrolled unit they apply to, so we find the person's enrolment in the Client Manager and expand it to find the appropriate unit.

To store information against a particular unit, we use the comment feature, so we right-click on the unit and select **Edit comment**.



Then click the document icon in the corner of the Result Comment Wizard:





1. Click the **Add** button to open the File Link Wizette.
2. Leave the Link Style as **Doc Db**, as per our settings above.
3. Select the Student Assignments file type.
4. Navigate to the location where you have saved their assignment.
5. The name of the file will be automatically filled in here, but you can change it to something else if you want. We are using a naming system that takes the unit code, the student code, and the number 1 to indicate it is the first assignment for the unit, but you can use whatever naming system makes sense to you.
6. Click **Finish**.

We can now see the assignment next time we open the wizard. Click **Open** to view the file, or **Edit** to change the details.

FileTrak document linking wizard

Enter file links
Press Add to add a new line in the grid. Browse for files as required. Press Next to continue.

Item information

Type: Enrolled unit
Details: CHCCN301A - Aardvark, Alan (VTR-00215) [491]

Documents/Files

| Link style | File type | Name | Filename | Desc | Last user | Last date | Open | Edit | Del |
|------------|---------------|-----------------------|--|------|-------------|-----------|------|------|-----|
| Doc Db | Student Assig | CHCCN301A-VTR-00215-1 | C:\Users\Public\Documents\Documents\Trainee Docs | | VETtrak, Tr | 8/05/2014 | ... | ... | ✖ |

Relative folder
C:\Users\Public\Documents\Documents\Trainee Docs

Close

Note that with documents stored in the document database, you cannot later edit the Link Style or File Location, as the link to the original file location no longer applies - there is now a separate copy of the file stored in the database.

File Link Wizzette

Add/Edit file link
Select the link style, file type and complete file name/URL (include file path where appropriate).

Link style: Doc Db
File type: Student Assignments

File location and name/URL: C:\Users\Public\Documents\Documents\Trainee Docs\

Name: CHCCN301A-VTR-00215-1

Description:

Cancel Finish

Later, if the student resubmits the assignment, we click the **Add** button in the Document Linking Wizard again to link the new copy of the assignment.

File Link Wizard

Add/Edit file link
Select the link style, file type and complete file name/URL (include file path where appropriate).

Link style: **Doc Db** | File type: **Student Assignments**

File location and name/URL: C:\Users\Public\Documents\Documents\Trainee Docs\

Name: CHCCN301A-VTR-00215-1A

Description: More details added to questions 3 and 5.

Buttons: **Cancel** | **Finish**

This time we have added the letter A to the end of the name to indicate it is a revised version of the assignment. (We could continue to save subsequent versions as versions B, C, etc. if applicable.) We have also added a description to show what changes we asked the student to make to the assignment.

We can now see in the wizard that there are multiple versions of the file saved, and the dates on which each one was saved:

FileTrak document linking wizard

Enter file links
Press Add to add a new line in the grid. Browse for files as required. Press Next to continue.

Item information
Type: Enrolled unit | Details: CHCCN301A - Aardvark, Alan (VTR-00215) [491]

| Link style | File type | Name | Filename | Desc | Last user | Last date | Open | Edit | Del |
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| Doc Db | Student Assig | CHCCN301A-VTR-00215-1 | C:\Users\Public\Documents\Documents\T | | VETtrak, Tr | 8/05/2014 | ... | ... | ✖ |
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Buttons: **Close**

NOTES:

- You cannot open and edit a file and then save the edited version back into the database. If you need to edit a file stored in the database, you would need to open it, save it on your computer, and then reupload the edited version of the file.
- This method allows you to see the full version history of a file, even if the original versions of it have been edited or deleted from where they were created. Once uploaded, there is no link between the version of the file in the database and the original on your computer.
- Take care when deleting records that are saved by this method, as deleting a record will also delete the document itself from the database. Ensure that you still have the original file, or that you really do no longer need the document, before deleting a record from this wizard.