



Online Enrolments User Guide



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Target Audience

All persons who engage with the admissions and enrolments process in Artena including:

- Users of Artena
- Supervisors of those using Artena
- Technical support persons

Revision History

Description	Revision date	Version number	Author
Initial document	14/04/2014	1.0	Samantha
Revised with introduction of new elements in Artena V09.09.00	19/03/2015	2.0	Samantha

Please help us improve this document. If you have suggestions for changes or additional content, email helpdesk@smss.org.nz.

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Prerequisites

1. Artena version 9.07.00 and above; some functionality is available from version 9.09.00 onwards
2. Access to Online Enrolments in Artena (granted through Security Administrator)
3. The Organisation's system must be configured to accept online enrolment applications (see Artena Deployment Guide 2 and Online Enrolments Setup Guide)

Access to Online Enrolments Functionality

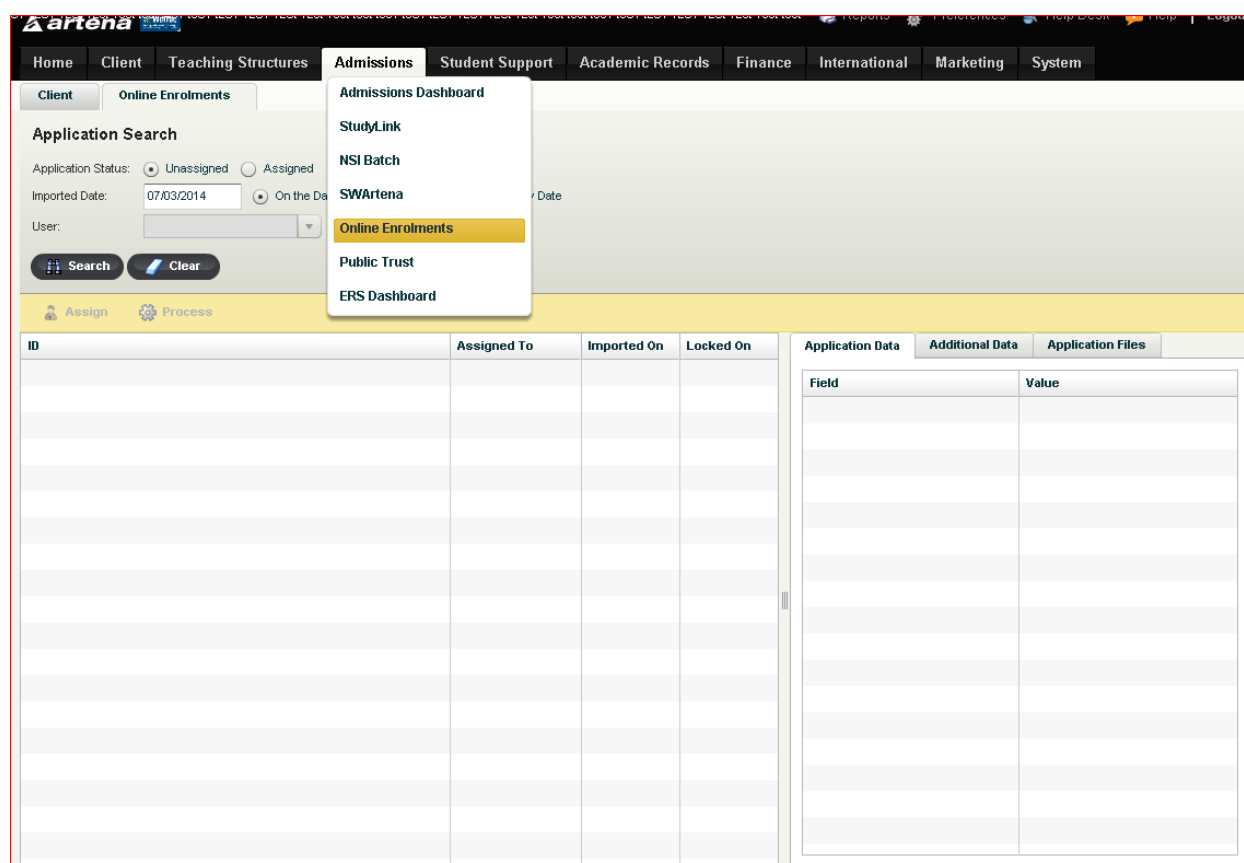
Security

Security controls:

- Ensure users are granted access to Online Enrolments through the Security Administrator module
- Ensure each user's email address is correctly completed in their security profile to enable the email messaging feature to function

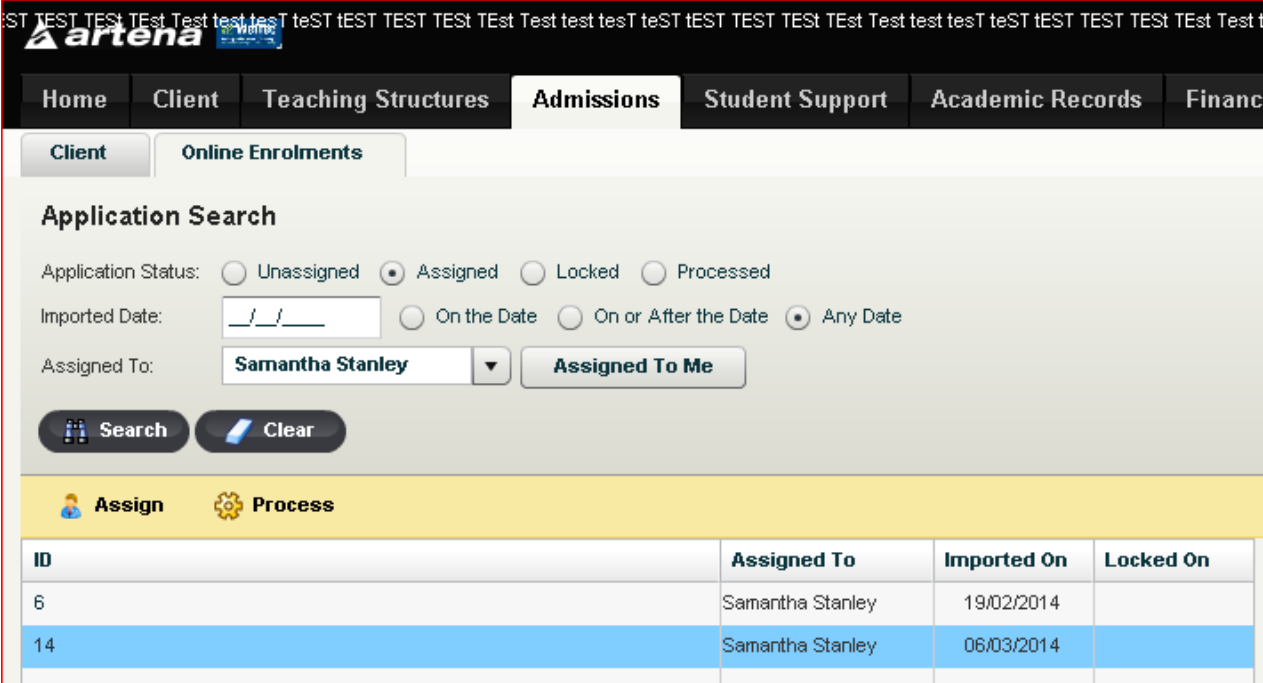
Location

- Online Enrolments is accessed through the Admissions menu



Online Enrolments home screen – Application Search functions

- Use this screen to search for applications
- Select the parameters you require and click the ‘Search’ button to execute the search
- The three search parameters work together to identify the applications you are looking for



Application Search

Application Status: ☐ Unassigned ☒ Assigned ☐ Locked ☐ Processed

Imported Date: ☐ On the Date ☐ On or After the Date ☒ Any Date

Assigned To:

ID	Assigned To	Imported On	Locked On
6	Samantha Stanley	19/02/2014	
14	Samantha Stanley	06/03/2014	

Application Status:

Parameter	Description
Unassigned	Use this status to search for new applications or to identify applications that are yet to be assigned to a user for processing
Assigned	Use this status to identify applications that have been assigned to a user for processing, either by the user themselves or by an authorised assignor
Locked	Use this status to identify applications that are currently being actively processed
Processed	Use this status to identify applications that have been fully processed, ie either accepted or rejected

Imported Date:

Parameter	Description
On the date	Applications imported on this exact date will be presented; default = today's date
On or after the date	Applications imported on or after this date will be presented
Any date	Applications imported on any date will be presented




Assigned to:

Parameter	Description
User name (drop down list)	<p>This is an actively filtered search box; as you type a name, the search for possible matches commences; select the name you require; applications assigned to this user will be presented</p> <p>Note: Leave this box blank to find unassigned applications</p>
Assigned to me	Clicking this button will automatically populate the search box with the logged in user's name




Online enrolments home screen – Application Actions

Assign

- To assign applications to yourself:
 - Select the required application/s
 - Click Assign to Me

<div>  Assign  Assign to Me  Process </div>			
ID	Assigned To	Imported On	Locked On
5	AA	18/02/2014	
6	AA	19/02/2014	
12	AA	06/03/2014	
14	Samantha Stanley	06/03/2014	

- To assign applications to other users:
 - Select the required application/s
 - Click Assign

<div>  Assign  Assign to Me  Process </div>			
ID	Assigned To	Imported On	Locked On
5	Samantha Stanley	18/02/2014	
6	Samantha Stanley	19/02/2014	
12	Samantha Stanley	06/03/2014	
14	Samantha Stanley	06/03/2014	

- The User Search pop up will display
 - Complete the required search parameters and click Search
 - Click the assignee's name and click Select

User Search

Beginning with

Containing

Display Name

al

Search

Display Name

Alan Cadwallader

Alan David Price

Alan Taylor

Alana Cowper

Aleeshea Reid

Alex Robertson

Alexander Scott Campbell

Alexandra Hewitt

Allan R Estall

ALLANDO




Select

Cancel

- Assign rules
 - Any user can assign applications to themselves
 - Authorised users can assign/reassign applications to other users
 - Multi-select > Assign is available
 - You can reassign an unprocessed application to another user



- You will get an email notification advising that applications have been assigned to you by someone else (you will not receive an email notification if you assign applications to yourself)

Process

 Assign  Assign to Me  Process			
ID	Assigned To	Imported On	Locked On
5	Samantha Stanley	18/02/2014	
6	Samantha Stanley	19/02/2014	
12	Samantha Stanley	06/03/2014	
14	Samantha Stanley	06/03/2014	

- To use the Process action
 - Select an application to process
 - Click Process to open the application in the processing area
 - Opening the application locks it so other users cannot process it
 - You can only process one application at a time
 - If you wish to exit an application, select Back; you will lose any changes you have made

Unlock




 Process  Unlock			
ID	Locked By	Imported On	Locked On
12	Samantha Stanley	06/03/2014	06/03/2014

- To use the Unlock action
 - An application will remain locked while a user has it open for processing
 - The application will unlock if the user backs out of it (note you will lose all changes)
 - In the event that a technical issue causes the active browser to close or a session terminates while an application is open for processing the application will remain locked; only the 'Locked By' user may reopen or unlock the application

Online Applications home screen – Data Forms

Application List:

- Search results will show in the application list on the main Online Enrolments screen.

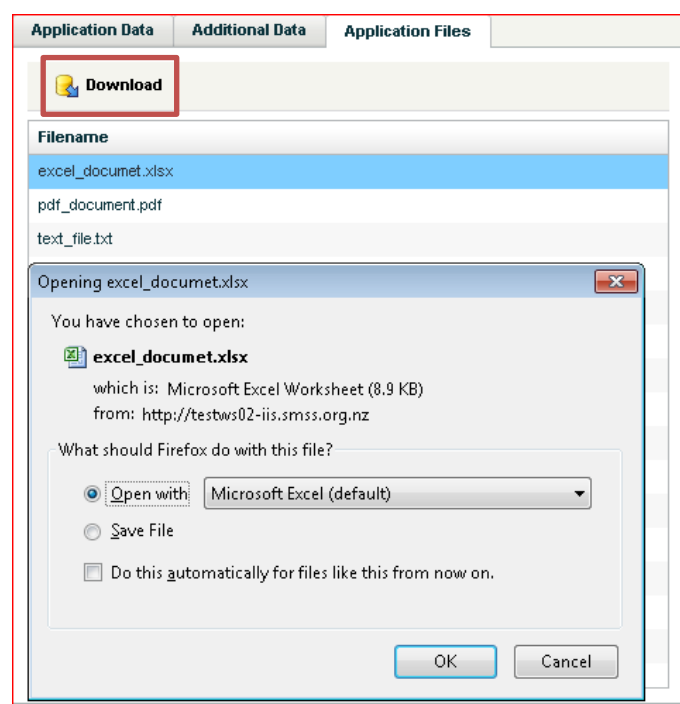
 Assign  Assign to Me  Process			
ID	Assigned To	Imported On	Locked On
5	Samantha Stanley	18/02/2014	
6	Samantha Stanley	19/02/2014	
12	Samantha Stanley	06/03/2014	
14	Samantha Stanley	06/03/2014	

- The columns shown in the application list are relative to the search performed

Column	Data description	Search type
ID	The unique identifier for the application form; system-allocated sequential numbers; system use only	All
Assigned to	The user to whom the application is currently assigned	Unassigned/Assigned
Locked by	The user who has the application open for processing	Locked
Processed by	The user who processed the application	Processed
Imported On	The date on which the application was imported into the online enrolment area	All
Locked On	The date the user opened the application for processing	All except Processed
Processed on	The date on which the user accepted or rejected the application	Processed
Status	Shows if the application was accepted or rejected	Processed
Person	Shows the name of the applicant if the application was accepted; 'jump to person' is available	Processed

Application Files

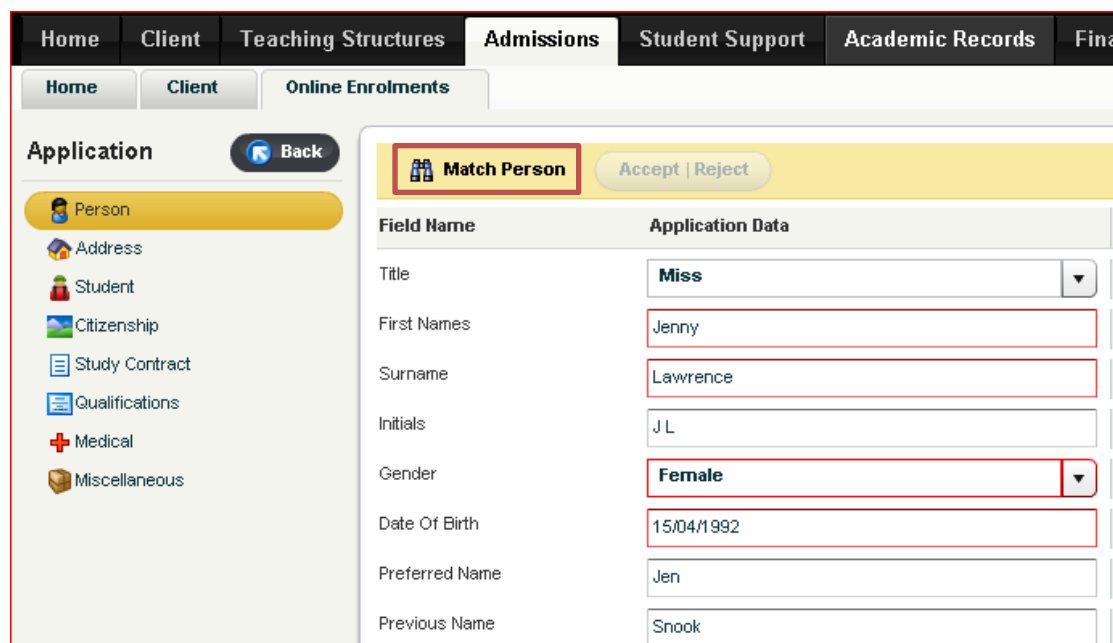
- The Application Files tab lists files uploaded by the applicant during the application process
- Documents are available to download and view before processing the application
- Select a document and click Download
- Documents open within their native programme external to Artena so they are available to view while processing the application
- If the application is accepted, the documents are able to be stored against the person record using the existing document upload process in Artena; the documents will then be available to view through the Person | Documents tab



Process an application

Step 1: Match Person

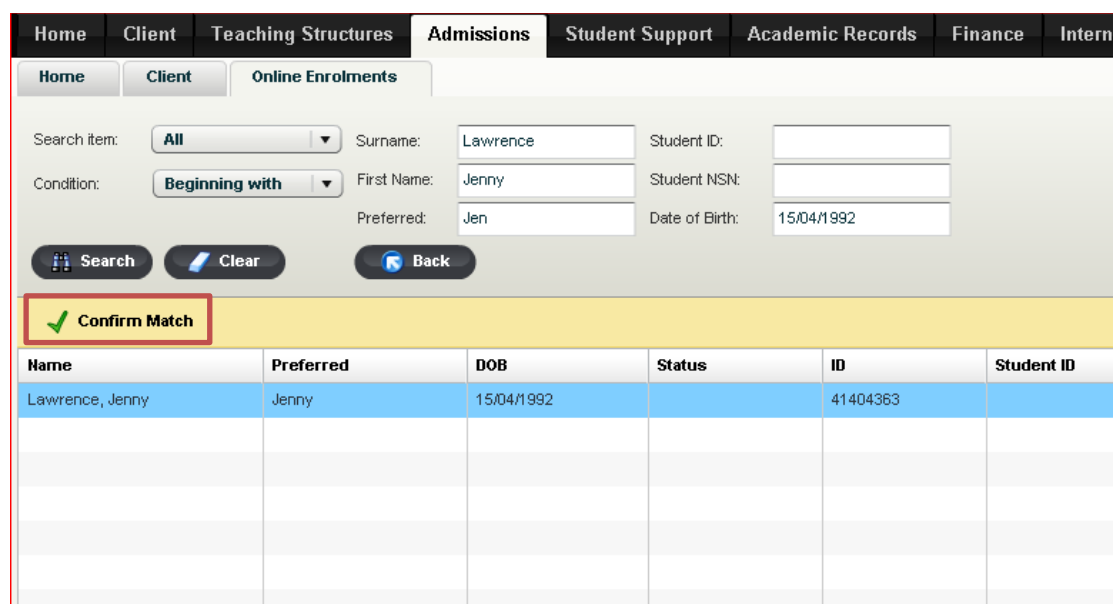
- The application processing screen works similar to LiveForm, allowing you to progress step by step as well as go back and skip forward through the screens as you process the application
- You must search the database for potential matches to the applicant before you commence processing



The screenshot shows the 'Match Person' screen within the 'Admissions' tab. The left sidebar lists various application components: Person, Address, Student, Citizenship, Study Contract, Qualifications, Medical, and Miscellaneous. The main area is titled 'Match Person' and contains a table of application data.

Field Name	Application Data
Title	Miss
First Names	Jenny
Surname	Lawrence
Initials	J L
Gender	Female
Date Of Birth	15/04/1992
Preferred Name	Jen
Previous Name	Snook

- When you click on the Match Person button, a screen similar to the Client Search screen will be presented
- This screen will be prepopulated with the applicant's details which can be edited to ensure you have exhausted all matching possibilities, eg remove NSN or preferred name
- Click Search to return any person(s) who exist in Artena that potentially match the applicant
- If you find a person you wish to identify as the applicant, select the person's record and click 'Confirm Match' or double-click the person's name
- Select 'Back' if you do not find a match or do not wish to select a presented option

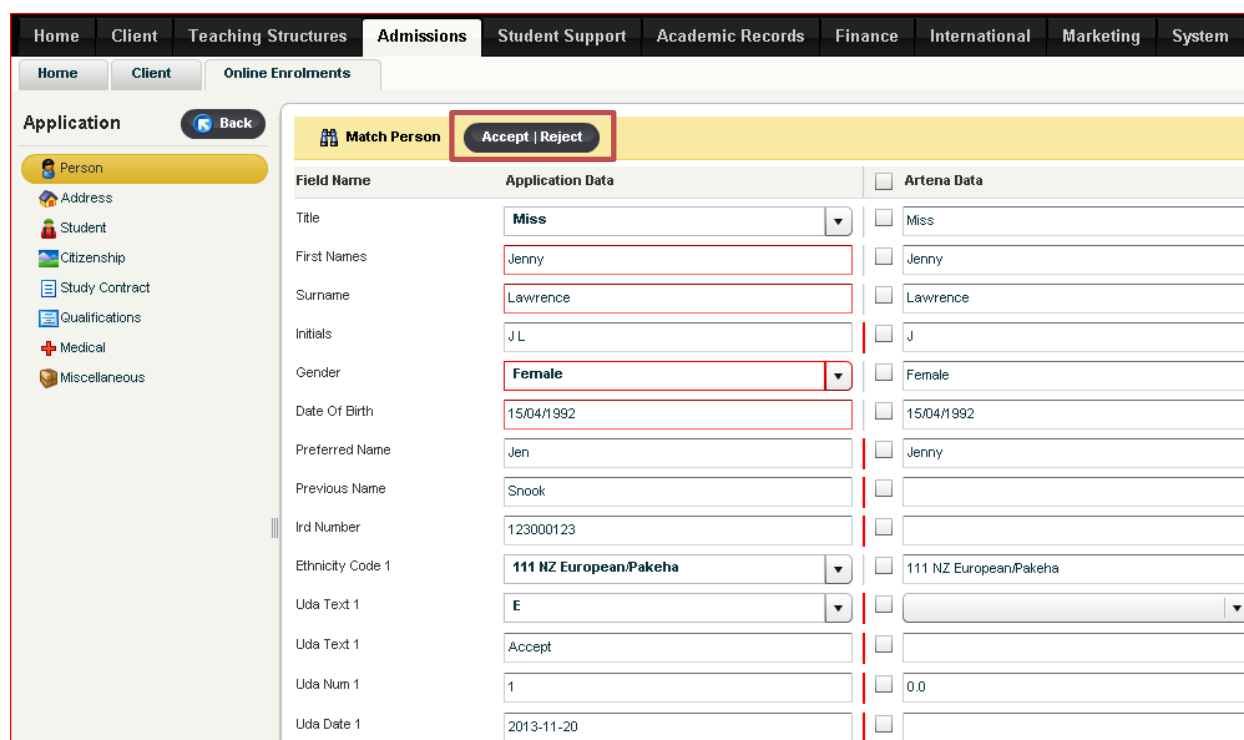


The screenshot shows the 'Confirm Match' screen. At the top, there are search filters: 'Search item' set to 'All' and 'Condition' set to 'Beginning with'. Below these are input fields for 'Surname' (Lawrence), 'First Name' (Jenny), 'Preferred' (Jen), 'Student ID', 'Student NSN', and 'Date of Birth' (15/04/1992). A 'Search' button is highlighted. Below the search fields is a table with a 'Confirm Match' button.

Name	Preferred	DOB	Status	ID	Student ID
Lawrence, Jenny	Jenny	15/04/1992		41404363	

Step 2: Understand the data

- The Accept|Reject button becomes active only after you Match Person regardless of whether you found a matching person or not



- There are two columns of data presented in the processing screens:
 - Application data – the data provided by the applicant through the online enrolment form. This is editable.
 - Artena data – if you found a matching person, the data contained in the Artena record will be presented here
 - A 'diff indicator' (red line beside each field) will show you where the data presented in the application is different to the data in Artena, eg the address might have changed since the person last attended your institution.
 - Note: if you did not find a matching person in Artena, these fields will be blank. This does not affect processing.
- If you found a matching person in Artena, you can choose to keep some, all or none of the existing Artena data by checking the boxes next to the Artena data you wish to keep. If you do not check an Artena Data box, the data in the application will overwrite the corresponding data in Artena, even if the application data field is empty.
- We suggest you ensure your business processes and rules guide users on how to decide whether to keep or override data. Personal information given in the online enrolment form is likely to be more up-to-date than legacy data in your database. Once the application is accepted into Artena, the data fields you chose to accept during the application process will permanently overwrite the existing data fields.
- There are two types of mandatory fields:
 - Fields that provide the minimum data to create a person with a student role in Artena (these are outlined in red)
 - Additional fields that your institution chooses to make mandatory in the enrolment form

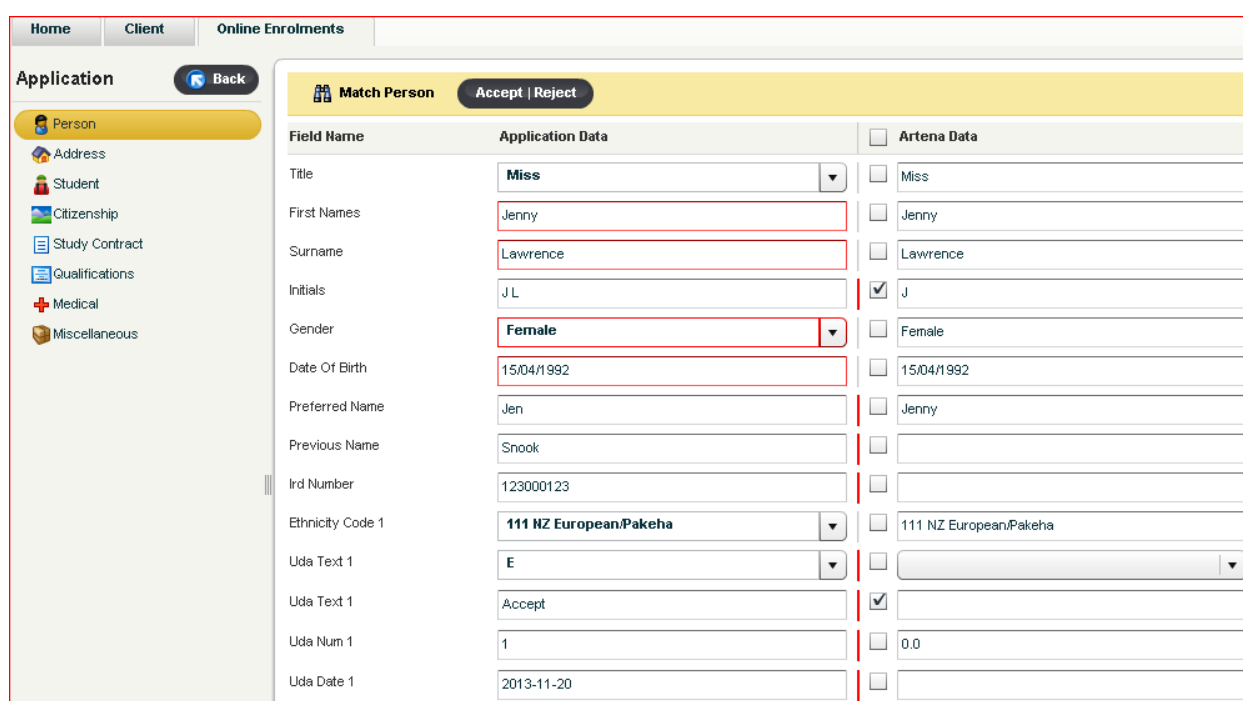
- We will ensure an application is not accepted into Artena without the Artena-defined mandatory fields however it is your responsibility to set your form up correctly to ensure it cannot be submitted without your mandatory fields, and that these fields are not deleted during processing.

Step 3: Process the application

- Step through each section as per LiveForm
- You may change data as you go, or indicate that the Artena data from a matched person (if applicable) is to be kept in place of the information provided in the application
- Note: fields will only show if you collect that data field in your application form, eg if you do not collect UDA information through the application form, these fields will not show in the application screens

Person

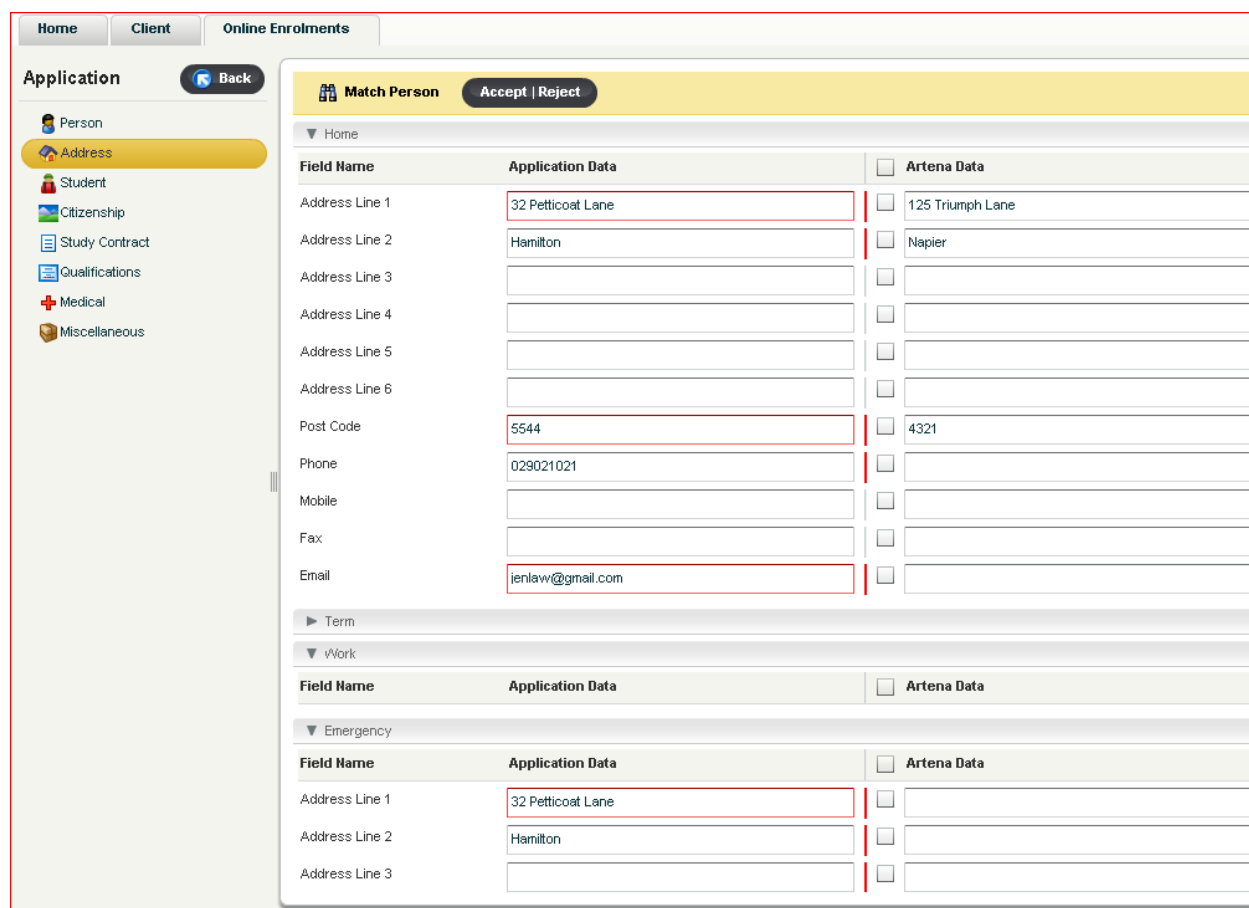
- Check the Person information is complete; indicate if you wish to retain Artena data over application data



Field Name	Application Data	Artena Data
Title	Miss	<input type="checkbox"/> Miss
First Names	Jenny	<input type="checkbox"/> Jenny
Surname	Lawrence	<input type="checkbox"/> Lawrence
Initials	J L	<input checked="" type="checkbox"/> J
Gender	Female	<input type="checkbox"/> Female
Date Of Birth	15/04/1992	<input type="checkbox"/> 15/04/1992
Preferred Name	Jen	<input type="checkbox"/> Jenny
Previous Name	Snook	<input type="checkbox"/>
Ird Number	123000123	<input type="checkbox"/>
Ethnicity Code 1	111 NZ European/Pakeha	<input type="checkbox"/> 111 NZ European/Pakeha
Uda Text 1	E	<input type="checkbox"/>
Uda Text 1	Accept	<input checked="" type="checkbox"/>
Uda Num 1	1	<input type="checkbox"/> 0.0
Uda Date 1	2013-11-20	<input type="checkbox"/>

Address

- Home address is mandatory
- Home email is mandatory
- Only addresses for which data was collected through your application form will be activated
- Address Line 1 and Postcode are mandatory for any active address

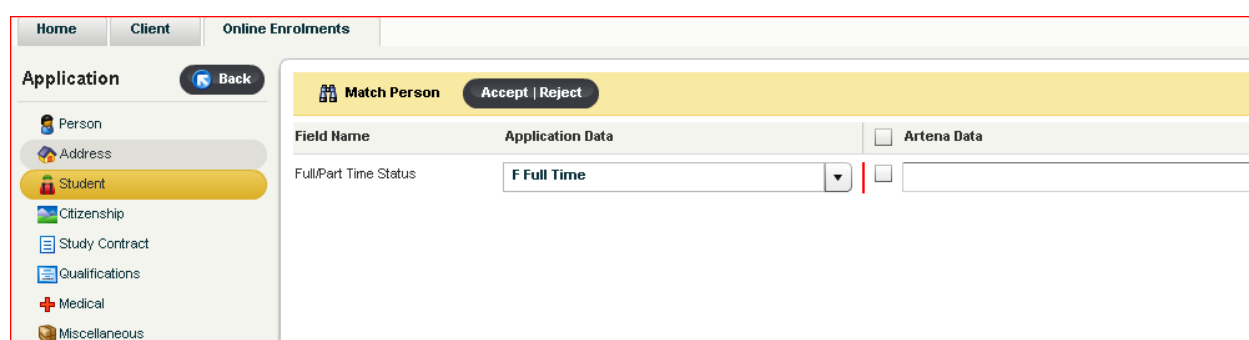


Field Name	Application Data	Artena Data
Address Line 1	32 Petticoat Lane	<input type="checkbox"/> 125 Triumph Lane
Address Line 2	Hamilton	<input type="checkbox"/> Napier
Address Line 3		<input type="checkbox"/>
Address Line 4		<input type="checkbox"/>
Address Line 5		<input type="checkbox"/>
Address Line 6		<input type="checkbox"/>
Post Code	5544	<input type="checkbox"/> 4321
Phone	029021021	<input type="checkbox"/>
Mobile		<input type="checkbox"/>
Fax		<input type="checkbox"/>
Email	jenlaw@gmail.com	<input type="checkbox"/>

- In this example Home and Emergency address types are activated and have all fields available; Work address is not activated and has no fields available
- You may edit any active address field
- Address verification is available via subscription; contact SMSS for more information

Student

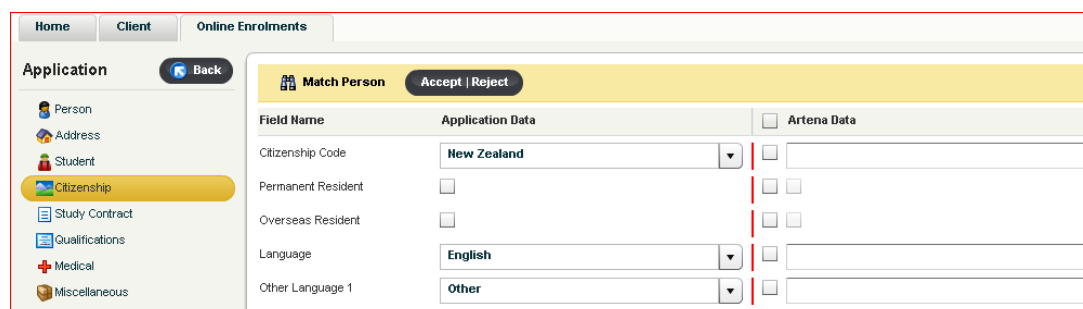
- High level data relevant to the student role is shown here
- Note that you may send Student ID and NSN from the Online Data, it will not update Artena Data



Field Name	Application Data	Artena Data
Full/Part Time Status	F Full Time	<input type="checkbox"/>

Citizenship

- Data concerning citizenship, iwi, language and international status is shown here

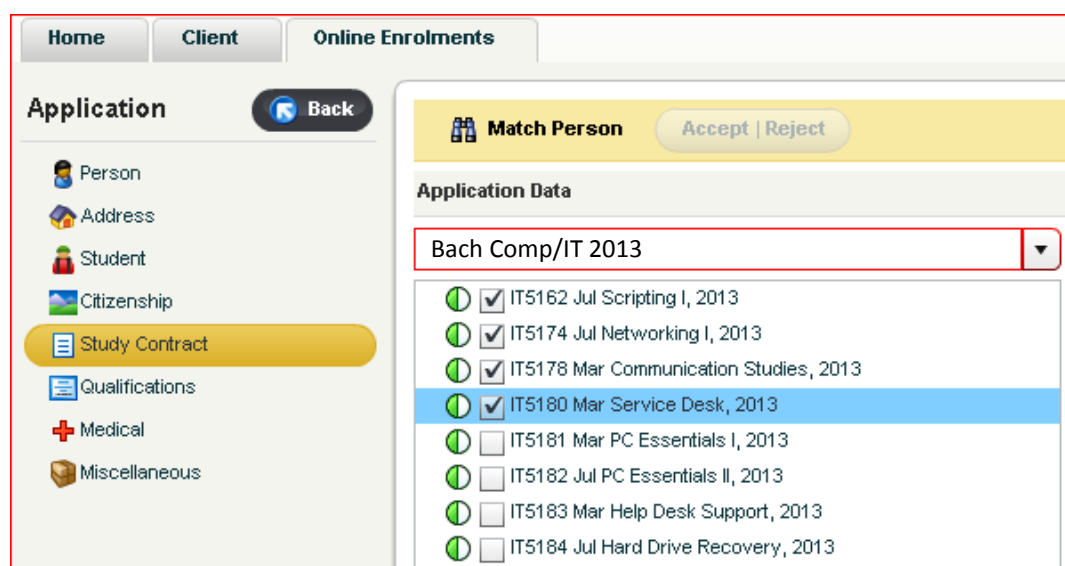


The screenshot shows the 'Citizenship' section of the application form. The left sidebar has 'Citizenship' highlighted. The main area has a 'Match Person' button and 'Accept | Reject' buttons. Below is a table with 'Field Name', 'Application Data', and 'Artena Data' columns.

Field Name	Application Data	Artena Data
Citizenship Code	New Zealand	<input type="checkbox"/>
Permanent Resident	<input type="checkbox"/>	<input type="checkbox"/>
Overseas Resident	<input type="checkbox"/>	<input type="checkbox"/>
Language	English	<input type="checkbox"/>
Other Language 1	Other	<input type="checkbox"/>

Study Contract

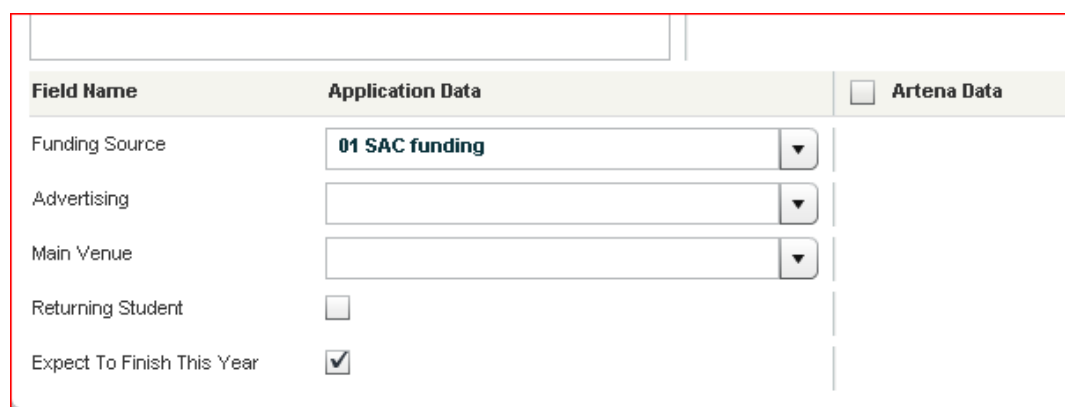
- The OTE selected will be used to create the study contract for the applicant; you may select an alternative OTE to the one selected by the applicant
- OTCs attached to the OTE will be displayed; OTCs requested by the applicant through the application form will be selected; you are able to select and deselect OTCs during processing



The screenshot shows the 'Study Contract' section of the application form. The left sidebar has 'Study Contract' highlighted. The main area has a 'Match Person' button and 'Accept | Reject' buttons. Below is a table with 'Field Name', 'Application Data', and 'Artena Data' columns.

Field Name	Application Data	Artena Data
	Bach Comp/IT 2013	<input type="checkbox"/>
	<input checked="" type="checkbox"/> IT5162 Jul Scripting I, 2013	<input type="checkbox"/>
	<input checked="" type="checkbox"/> IT5174 Jul Networking I, 2013	<input type="checkbox"/>
	<input checked="" type="checkbox"/> IT5178 Mar Communication Studies, 2013	<input type="checkbox"/>
	<input checked="" type="checkbox"/> IT5180 Mar Service Desk, 2013	<input type="checkbox"/>
	<input type="checkbox"/> IT5181 Mar PC Essentials I, 2013	<input type="checkbox"/>
	<input type="checkbox"/> IT5182 Jul PC Essentials II, 2013	<input type="checkbox"/>
	<input type="checkbox"/> IT5183 Mar Help Desk Support, 2013	<input type="checkbox"/>
	<input type="checkbox"/> IT5184 Jul Hard Drive Recovery, 2013	<input type="checkbox"/>

- Other data relevant to the study contract is displayed at the bottom of the Study Contract screen



The screenshot shows the bottom section of the Study Contract screen. It contains a table with 'Field Name', 'Application Data', and 'Artena Data' columns.

Field Name	Application Data	Artena Data
Funding Source	01 SAC funding	<input type="checkbox"/>
Advertising		<input type="checkbox"/>
Main Venue		<input type="checkbox"/>
Returning Student	<input type="checkbox"/>	<input type="checkbox"/>
Expect To Finish This Year	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Enrolments

Match Person **Accept | Reject**

Field Name	Application Data	<input type="checkbox"/> Artena Data
Referee 1 Name	Billy King	<input type="checkbox"/>
Referee 1 Phone	02 231 1236	<input type="checkbox"/>
Referee 1 Address Line 1	Burger King	<input type="checkbox"/>
Referee 1 Address Line 2	125 Main Road	<input type="checkbox"/>
Referee 1 Address Line 3	Hamilton	<input type="checkbox"/>

Qualifications

- Data concerning previous secondary and tertiary study is shown here

Home **Client** **Online Enrolments**

Application **Back**

Match Person **Accept | Reject**

Field Name	Application Data	<input type="checkbox"/> Artena Data																
Year Secondary Qual Attained	2011	<input type="checkbox"/>																
Year First Tertiary Enrolment	2013	<input type="checkbox"/>																
Year Last Secondary Education	2011	<input type="checkbox"/>																
Last Secondary School	Hamilton Girls High School	<input type="checkbox"/>																
Highest Secondary Qual	15 NCEA L3 or Burs or Scholarship	<input type="checkbox"/>																
Main Activity	03 Wage or salary worker	<input type="checkbox"/>																
Other Qualifications	<table border="1"> <thead> <tr> <th>Title</th> <th>Year</th> <th>Institute</th> <th>Completed</th> </tr> </thead> <tbody> <tr> <td>6001</td> <td>CCNA Level</td> <td>2012</td> <td>No</td> </tr> </tbody> </table>	Title	Year	Institute	Completed	6001	CCNA Level	2012	No	<input type="checkbox"/>								
Title	Year	Institute	Completed															
6001	CCNA Level	2012	No															
	<table border="1"> <thead> <tr> <th>Title</th> <th>Year</th> <th>Institute</th> <th>Completed</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>	Title	Year	Institute	Completed													<input type="checkbox"/>
Title	Year	Institute	Completed															
Major Subject	Computer Science	<input type="checkbox"/>																
Second Subject	Asian Languages	<input type="checkbox"/>																
Third Subject	Business Administration	<input type="checkbox"/>																

Medical

- Data concerning medical and support requirements is shown here

Home **Client** **Online Enrolments**

Application **Back**

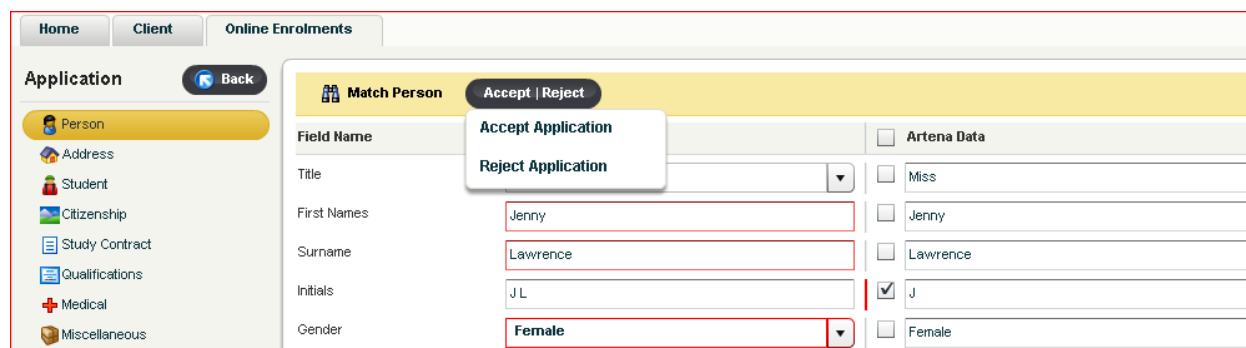
Match Person **Accept | Reject**

Field Name	Application Data	<input type="checkbox"/> Artena Data
MOE Disability	2 Disability Identified	<input type="checkbox"/>
Support Required	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disability Types	<p>Disability Type</p> <p>Hand function/OOS</p>	<input type="checkbox"/>

Accept or Reject the Application

Accept

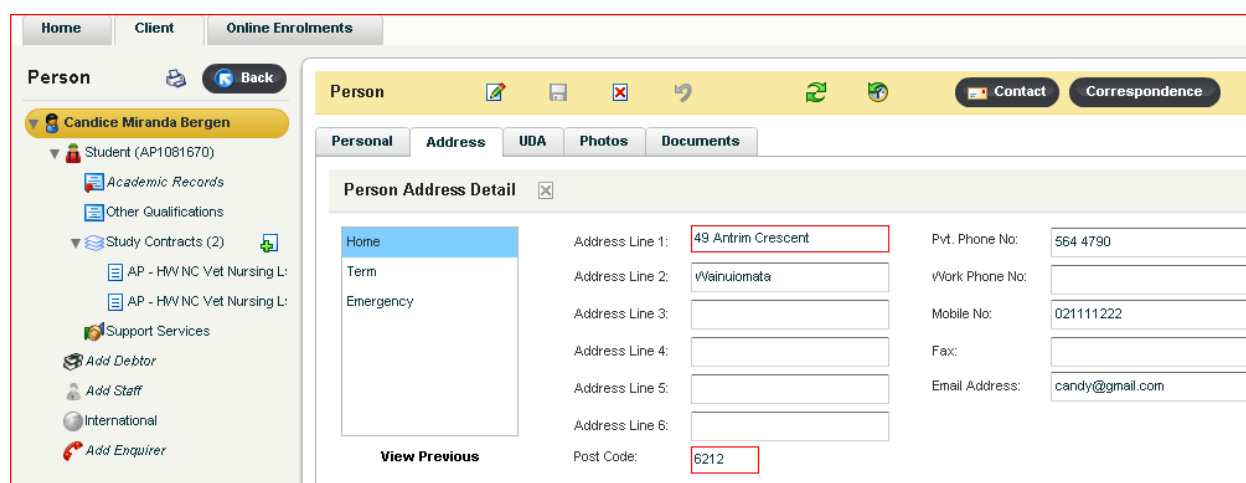
- Once the user has finished reviewing and editing the data they accept or reject the application



- Accepting an application creates a Person with a student role or appends application data to an existing person if a match was found
- A jump to Person button is available to enable the user to jump straight to the person's record in Artena and continue processing the application

ID	Imported On	Processed On	Processed By	Status	Person
1	18/02/2014	18/02/2014	Samantha Stanley	Accepted	e1, e1
2	18/02/2014	05/03/2014	Samantha Stanley	Rejected	
8	28/02/2014	04/03/2014	Samantha Stanley	Rejected	
7	27/02/2014	27/02/2014	Samantha Stanley	Accepted	Frankel, Louise
4	18/02/2014	03/03/2014	Samantha Stanley	Accepted	Alexander, Brandy
3	18/02/2014	05/03/2014	Samantha Stanley	Accepted	Stone, Sharon
9	03/03/2014	04/03/2014	Samantha Stanley	Rejected	
10	03/03/2014	03/03/2014	Samantha Stanley	Accepted	Bergen, Candice Miranda
13	06/03/2014	06/03/2014	Samantha Stanley	Accepted	Bergen, Candice Miranda
11	04/03/2014	04/03/2014	Samantha Stanley	Accepted	Beiber, Miley Moo

- A study contract is created and information under the student role such as Other Qualifications and Support Services is populated



Reject

- A rejected application does not create or append data to a person in Artena
- A record of the application is kept

Reassign to Me							
ID	Imported On	Processed On	Processed By	Status	Person	Application Data	Additional Data
1	18/02/2014	18/02/2014	Samantha Stanley	Accepted	e1, e1	Field	Value
2	18/02/2014	05/03/2014	Samantha Stanley	Rejected		FirstNames	e2
8	28/02/2014	04/03/2014	Samantha Stanley	Rejected		Surname	e2
7	27/02/2014	27/02/2014	Samantha Stanley	Accepted	Frankel, Louise	GenderCode	M
4	18/02/2014	03/03/2014	Samantha Stanley	Accepted	Alexander, Brandy	DateOfBirth	1980-01-01
3	18/02/2014	05/03/2014	Samantha Stanley	Accepted	Stone, Sharon	DisabilityTypeCodeCsv	004,009,010
9	03/03/2014	04/03/2014	Samantha Stanley	Rejected		PreviousTertiaryCsvx	2001,6001,Award A,1,2004,6002,Award
10	03/03/2014	03/03/2014	Samantha Stanley	Accepted	Bergen, Candice Miranda	OtherQualificationCsvx	2001,Some Institute,Award A,1,2004,Sort
13	06/03/2014	06/03/2014	Samantha Stanley	Accepted	Bergen, Candice Miranda	OteUId	5251058
11	04/03/2014	04/03/2014	Samantha Stanley	Accepted	Beiber, Miley Moo	HomeAddressLine1	

Notes

- You will continue to be able to view application data in the data tabs on the search screens
- You are unable to open and process an application after it has been accepted or rejected