

# Artena/Take2 User Forum 2017

---

## DAY 1

### 1.1 Session 1 Room 1 Welcome and update on the Product Development Roadmap

Welcome and introductions from Cheryl.

- Please see any of the team if you are not receiving newsletters, release news and would like to get them.
- Also if you can think of a better way of keeping people in the loop, we would love to hear from you.
- Artena/Take2 problems discussed

### Artena Roadmap Update

- Practicum went live last year.
- ArtenaSP in testing now. NorthTec is testing it, we will give demo this afternoon.
- Discounts and Alumni are being pushed out a bit, towards end of this year, beginning of next. Still need more understanding of various scenarios.
- Tutor and Staff Portal TBC.
- 3<sup>rd</sup> party portal, Multi Company, workflow 2018.

### Take2 Roadmap

- Take2, we are working on a roadmap for you, it will be communicated via newsletter.

### Enhancements

- Over 40 hrs of development is a project. <40 is an enhancement. These need to be logged through the Helpdesk.
- No enhancement session at forum this year, a new process has been introduced at the request of clients.

### Enhancement process (see Appendix for diagram)

- Customer raises a request and logs a request via the helpdesk.
- AITA assesses request (aligned to product vision?)
- If yes, enters development phase.
- If no, dialogue with client.

Adapt IT have revamped the process to speed up turn around. Any changes that impact how Artena works or that would affect other clients will be communicated.

Concern was expressed by clients in attendance that they are losing their voice. An enhancement that doesn't look worth it to Adapt IT might be of interest to several clients. Adapt IT to consider communication process to keep clients in the loop of enhancements and the decision.

Cheryl commented that once an enhancement has been approved and assigned to a release, clients will be advised. This could be through an enhancement newsletter or some other form of advice. Noted, that the website includes forum functionality that could be used for discussions.

Clients:

- Asked if who requested the enhancement can be included.
- Asked that Adapt IT check with clients about how beneficial enhancement would be.
- Agreed they need to take responsibility/onus for answering within a 3/5 day timeframe following a communication from Adapt IT.

Take2 users please email any requests you have now, as we are about to start on Take2 Roadmap.

## 1.2 Session 2 Room 1 External Session NSI

**Tip:** Enter the fullest name you can (i.e. include middle name(s)) when searching and birth date will make searching easier.

Please take care when inputting data.

**Data Quality challenges.** You can raise a challenge via web or by phoning service desk.

**Merge requests,** if you identify duplicate records, please log a merge request via the NSI webpage. There is a merge request status page on NSI website where you can see status of your request.

Has had positive feedback about how well Artena and Take2 integrate with NSI REST interface.

- Jacqui presented NSI presentation
- Taratahi Agricultural Training Centre: mentions a case where they cannot update NSI match in Take2 but can on website
- Partial – no more available
- Active – use to mean that both the Name/DOB and Residency were verified
- Active – now means current student and a record that you may use i.e. not retired record
- Jacqui can make a list of documents available
- Joan enquiry about gender in systems. Response is that gender X not in NSI yet
- Chona (TWOA) asked about Maori student documentation i.e. whakapapa
  - Ministry to verify first and only if birth certificates are not available at all eg courthouse was burned and all records destroyed.
- Changes to NSI mentioned:
  - Score value – decimal points differ between REST and WebUI, so that is why you can add them in WebUI but not in SMS sometimes – will fix soon
  - Can reorder names if you need to – contact servicedesk
  - Can upload a better verification – verification scale
  - Can upload better verification for alternative names, but not change alternate names.
  - Will get notification on merge records from slave record
  - Changes to preferred name
  - Alternative name to alert if no family name entered
  - .NET upgrade

## FAQ

### Searching

#### **How do I create a record if there is a similar one already existing in the system?**

Close matches – You can create a new record – For matches that the system determines as definite matches, you will need to contact Service Desk – Raise a challenge.

Feedback is that you are raising more challenges than previously.

Client (WITT): Often NSI says it's a definite match, when it clearly isn't, e.g. birthdate is wrong. Jacqui will feed back to helpdesk.

### Updating/Creating new NSNs

#### **What do I do if I find a duplicate record for a student?**

Request a merge, or raise a Challenge against one of the student records, or contact Service desk directly.

### Updating / Creating new NSN's

#### **NSI only has 3 given name fields. How do I record a student name that has more than 3 given names?**

Enter the other given names in the third given name field. If there are lots and lots, spread them out over the 3 fields.

#### **How do you record a student name if they only have a given name and no surname?**

Record the student's name in the Family name field and a ~ in the Given name 1 field.

#### **Why can't a married name be updated in the main record of a birth register verified record? Will this affect SDR submissions?**

Add in alternate name field in NSI. You can add married name into your SMS student field record. The record has been matched against the births register held at the DIA. Only a current birth certificate showing official name change or name change certificate can be accepted to challenge the name details. The DIA do not class marriage as an official name change, rather an "assumed name for legal purposes".

You should not receive an SDR error if the name you are using in SDR (Birth name or married name) is recorded in NSI as an Alternate name or Primary name.

#### **Why do I sometimes get an error when updating birth date?**

Providers are only able to update Birth date on newly added NSN's (Within the first 90 days of a record being created) if the record was created by their own provider. This applies to both verified and unverified birth dates.

#### **Can I update a student's gender in NSI?**

Yes, the Gender field can be edited any time, regardless if the record is verified in NSI.

#### **Can I update the residential status once it is verified?**

Yes, Residential status may be updated (even if it is verified) with supporting documentation.

### Interpreting the NSI data

#### **What does "Verification confirmed by MOE" mean?**

The MoE Service desk has been sent a copy of the supporting evidence for this attribute (Name & Birth date or Residential status). HelpDesk has seen that bit of data.

Active and partial used to be used. Now there is no more partial. Depends on what needs to be verified. Active is a student that has been identified and can be used.

#### **How do I record a student's gender if they are not male or female?**

NSI accepts a value of "U" for gender unknown. SDR doesn't accept U for verified student. There might be a gender X too in the future.

#### **Challenges**

##### **What do I do if I have created a record with incorrect name/DoB?**

Birth dates can be corrected within the first 90 days of a record being created, if the record was created by your provider.

If the name is verified, raise a challenge, or contact the Ministry's Service Desk. Please do this, as correcting the record as soon as possible will avoid the possibility of someone else finding this incorrect record at some point in the future.

##### **Why has my challenge been rejected?**

Evidence is required to support any change to a student record – the documentation must demonstrate that the student has been known by all names listed on the record. Insufficient evidence is the main reason why a challenge would be rejected.

#### **Evidence of Identity**

##### **When do I need to provide evidence of identity to the NSI Unit?**

You may be requested to provide evidence of Identity in the following situations:

- If you are requesting to have a new NSN added for a student where there is already a record in NSI that appears to be a definite match.
- If you or another provider challenges some details on a NSN.
- An NSN you created is part of a merge request that is being assessed by a MoE service desk team member.

##### **Why can't I attach EOI docs when submitting a challenge in NSI?**

Our system doesn't not currently cater for this feature.

##### **What documents are accepted as EOI?**

There are three options available in NSI – Birth cert, Passport and Other:

- Marriage Certificate
- Marriage Dissolution Certificate
- Citizenship certificate
- NZ Drivers Licence
- Name Change Certificate
- Visa (work, student, partnership, resident, etc.)
- Expired passport that has not been cancelled (at the discretion of the provider)
- Certificate of identity (including a copy of a birth register entry)
- Whakapapa only with permission of MOE (where documents have been destroyed and no longer exist)

##### **Can I use an expired passport to verify a student record?**

Yes, to verify the name/DoB only (i.e. not residential status) and at the discretion of the provider.

##### **Does NSI show NCEA results?**

No

Client question: **Why can't I enter a new student via REST interface but can via Web User Interface?**

This is because currently REST rounds up or down, Web truncates. Truncating will be happening on all interfaces.

### **1.3 Session 3 Room 1 External Session Study Link**

- Take picture or scan of document and submit via Studylink (connect.co.nz, sign in using Real ME). Documents regarding personal identity need to be verified.
- Code 31: Where you kept student fees but it's not a valid enrolment.
- Partly withdraw – cannot use SOF 31 and 01 at the same time – so need to send the one that is the most EFTS value.
- When you keep the money and report it, it does affect student's lifetime limit.
- If student withdraws out of course but continues the rest i.e. change from full time to part time – then Study Link need to know about change in EFTS so allowance might be cancelled.
- Change to equal value in money and EFTS and time, then don't need to know.
- Question on RPL – RPL student in full classes a problem – Need to look at course content to get them out early or ask MOE to change rules.
- PS Compulsory fees are common fee to all students, if not then shouldn't be part of compulsory fees.
- Allowance and loan applications separate – so different rules on both.

### **1.4 Session 4 Room 1 External Session LLN**

Please have a look at link on website for how to use best practice to meet funding requirements.

The Guidelines have just been updated. <http://www.tec.govt.nz/assets/Forms-templates-and-guides/Guidelines-for-using-the-Literacy-and-Numeracy-for-Adults-Assessment-Tool.pdf>

- TEC busy with API project – upload in future.
- Ben does webinars to assist if required.

### **1.5 Session 4 Room 1 Q & time from External Sessions**

- Cheryl asked about SDR, VOS, NSI and NZQA problems
- Joan noted that the question is there about what will students see when they click on the website and see short course etc.
- Public trust – Neroli noted they had problems, but not the system, NZQA problems.
- UIP project noted too

## 1.6 Client Show and Tell – Artena SP

### DAY 2

#### Session 1: Qualification Audit and Assessments (Room 1)

##### Qualification Audit

- User presentation by Lesley.
- EIT follow a process of sending documentation to approvals committee for awarding qualifications.
- This includes the Qualification Audit report print out.
- Joan raised the idea of using the tool for student course planning as well as awarding results.
- Tip – make sure that the level of complexity, subject area is set for all courses to ensure the qualification audit process works correctly.
- Lesley mentioned that tutors do not have access to Artena at EIT which is a barrier for using Qualification audit as a student planning tool.

##### Assessments

- Concerns about security with regards to the transfer of results to academic records.
- Splitting duties – Tutors will capture assessment outcomes. Administrators will transfer results to academic records.
- Further discussion around using the statuses on academic records and review process which rights can be given to administrators.
- Desire to restrict searching and entering of assessments to only those courses that are allocated to the specific tutor.
- Discussed possibility of an import/export process for assessments.

##### Actions requested by Audience during the session

- Requested general feature on Artena forms eg Assessments Dashboard, Admissions Dashboard, to export the data displayed on screen to excel .
- Add Assessments to the Online Demo sessions for Artena.

##### Final Discussion

- Easier way requested to clone classes eg, select date range to create classes (1 per day) within (Danielle, Techtorium/Amanda, IPU).

#### Session 2: Finance Workshop – (Room 2)

##### Recent changes/existing

##### Debtor management

##### Enrolment NOK (not okay).

The rules apply universally across all areas of enrolments.

If a student has overdue accounts or is deceased, finance can put a blocker against students.

New box at the bottom of Client search “Enrolment NOK flags”. Quite private, just tells you that it is locked and a broad general reason.

You cannot create study contracts for a person with NOK flag.

Debtor management in Artena has a couple of status fields. You can tailor what values are on there and whether or not they trigger an enrolment block. Example status Peter used – “Bad debtor - do not enrol” under debtor status field. You can set your own statuses.

The credit rating field also enables blocking.

Review how you use debtor status/credit rating fields and enrolment block validation fields - rules 1083 and 1125. Look up rules by rule ID under validation in System tab. Go into system and look up tables and you can change display text in Debtor status fields – can make them visible or not.

Please give us feedback about how you manage debtors and what you think of our aged debtors report. Feedback that debtor status field would be good to be displayed on aged debtors report too.

Please use Contact log to record formal debtor information. A lot of people use comments box rather than contact log. This will often get edited by other users or deleted. Can choose setting that can choose one person to edit contact log across the board or set it so users can only edit their own entries.

New feature, people who haven't got access to finance info, won't see debtor info in contact log.

A new standard report Finance Administration Will help with set ups for next year.

This report is available under Finance->Administration. Click the report button in the yellow bar at the top.

Open in Excel. Turn on filter function and freeze header row for easy perusing of report.

## **Discounts**

Discounts enhancements currently in progress. Peter demonstrated in Artena.

Go into study contract and issue invoice. Working on disabling users from manually altering invoice amount, have to use discounts. As an organization you can enforce certain actions in the workflow. You can set different types of Discount rules, can be fixed value, percentage discount, or fee cap.

Now you have a record for how much has been discounted, which was applied directly to total before.

Sensitive issue TEC, the have rules around which discounts you can apply. We're giving you the functionality, onus on you to find out TEC rules.

Under finance admin, go into add new discount rule to set up new rule.

Client Question regarding discount that applies to set time period (i.e. early-bird discount): Nursing students have to supply a lot of information before Enrolment is finalised. They might have enrolled during discount period, but the actual enrolment is actualized after rule becomes inactive, if rule is discretionary that would be okay.

Credit note will reverse fee and discount.

When it's all done and properly tested there will be a user acceptance testing phase before its being rolled out.

You can look up Artena Finance system parameters under Artena online help.

Financial date controls were positively received. Disappointment when told that they will be worked on after the discounts project.

### **Session 3: SCE Session – (Room 2)**

#### **Sending out correspondence**

Most often correspondence button is usually very obvious on a page. If you can't see it you may not have permission. Depending from where you click on it, you get a different context and different options.

#### **Letter**

Once you've generated letter, you can look at the generated letter by downloading a preview. If you are happy, you can then print it out - the delivery status changes to printed, which logs it in the contact log so everyone knows it actually went.

#### **Email/SMS**

If you send email or SMS make sure you have email address or phone number for student. If the email is incorrect, you won't find out unless IT People notify you, mail server will show which email message was sent out from. Clients mentioned that they will send out an SMS advising students that they got sent an email and to advise registry if they have had a change in email address. For email you are again able to download a preview. Once you have pressed the "Send" button, delivery status will change from generated to sent.

#### **One-offs**

If sending out correspondence on the fly. Go to "Send Correspondence". You don't even have to name the template, just choose email and you'll get a message template editor; you can specify the reply to email address. Go to object list and use the replacements fields to avoid making mistakes. Drag and drop desired replacement fields into email. If you click on D, you will see common name rather than code.

Under Common Object List, there are a whole lot of fields including job creator, job creator signature (at this stage text signature only). To see the info go to Preferences, Personal.

Click view once the email has been generated to check that it all looks okay.

**TIP:** Once you have clicked "Send Correspondence" You can put a description in template field, but not save it, this means it doesn't show up on contact log as a manual entry but also doesn't create a new template.

#### **Different types of files used in correspondence**

**Stock document** is a pdf file, like a flyer/poster. Nothing needs to be pulled into it.

**Merge document** has replacement fields.

**Reports** - some academic transcripts are reports, thus this is an option.

You can look up how to import merge fields into word in Artena Help, if it doesn't work for you, contact [helpdesk@adaptit.co.nz](mailto:helpdesk@adaptit.co.nz) for a guide that lays it all out.

The context where you're sending it from is important. You won't have access to right components if the context is incorrect.

When creating a new email and you have ticked HTML format enabled, you can bring up HTML help at the bottom of the box.

When using UDRF fields please make sure users use right format, i.e. if it's a date field, don't enter text.

### **Sending bulk correspondence**

Send in bulk from dashboard.

There was some discussion around bulk printing. You download bulk letters, extract and then send to printer. NorthTec says can only do up to 15 at a time.

Can you do bulk e-text on the fly (as one off)? Yes.