Summary Information

Summary information is useful to most providers for both internal and external audiences. For example, your boss demands a breakdown of students by gender and disability, or TEC demands a summary of qualification completions for a given academic year. You'll be all too familiar with this kind of thing.

Currently there are in *Take2* three collections of summary information available:

- *SSP* – designed to provide equal educational opportunity and educational performance measures for the Statement of Service Performance.
- *Targeted Summary* – designed to summarise TOPS and Youth Training trainees and their withdrawal and outcome data.
- *Strategic Relevance* – designed to summarise entry and exit profile data (employment, further training, etc.), as well as outcome data for the assessment of strategic relevance.

These summaries take the form of Excel pivot tables which can, if you wish, be supported by audit reports also produced in Excel.

We are aware, though, that TEC's new funding and monitoring processes may require you to prepare summary information in a format that is not provided for with the above options. If this is the case we will be the last to know because TEC simply ignores our request each year for an update on their reporting requirements.

So we would be very pleased to hear back from you on whether you are able to get all the summary information you need from *Take2*, or is there something missing? Very specifically, is there something missing that is, you believe, a key set of information for funding and monitoring.
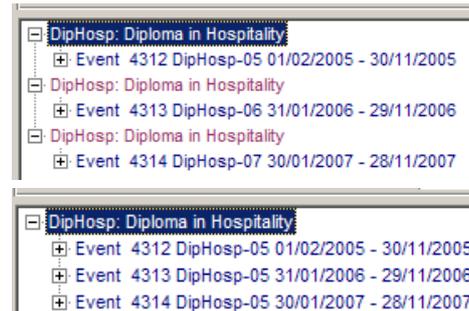
Qualification Enrolments

From next year – unless TEC get cold feet at the last minute – you will be required to report a qualification enrolment file at every SDR and not just a qualification completion file once per year.

This arrangement could cause some clients grief if they have been processing enrolments in a particular way. We suggest that you read the this article to see if you will be affected and what you can do if you are. If you find out that you will not be affected, then you can be smug and have a cup of tea.

The first question is – do you have multi-year/multi-stage qualifications? For example, a three year Diploma or a two year Certificate? If you do not, then you are unlikely to be affected.
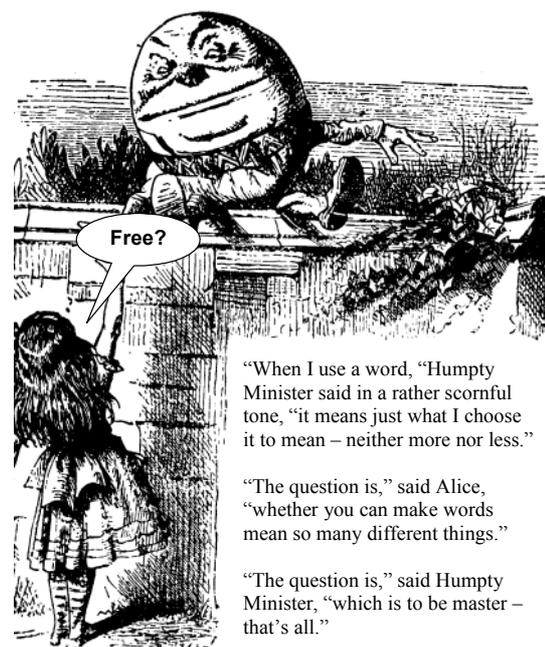
The next question is, how have you processed each year/stage enrolment? Have you created a new qualification enrolment and enrolment event for each year/stage (first screenshot below) or have you simply created one qualification enrolment and multiple enrolment events (second screenshot below)?

If you have only one qualification enrolment, then relax. No problems.

If you have created more than one qualification enrolment, then you may have a problem but don't panic! We will be able to find a way of solving the problem by re-configuring your enrolment records and there will be more information on this topic in a future Newsletter.

In the meantime, though, if you do have multi-stage/multi-year qualifications, do make sure that you create only one qualification enrolment for each student and, if you are unsure about how to do this, please contact the Help Desk.

"When I use a word, "Humpty Minister said in a rather scornful tone, "it means just what I choose it to mean – neither more nor less."

"The question is," said Alice, "whether you can make words mean so many different things."

"The question is," said Humpty Minister, "which is to be master – that's all."

Take2 Top Tips – ERS (Electronic Receipting) Interface

The ERS interface in *Take2* is used to register TOPS and Youth Trainees directly on the TEC ERS database. The development of the interface and TEC ERS mechanisms has been a very difficult experience and, regrettably there are still some loose ends. This month's Top Tip explains describes a couple of those loose ends and how to work around them, and also provides information on an update to *Take2* that has been designed to allow you to diagnose ERS problems quickly and accurately.

First, those loose ends:

- The TEC specification for the ERS describes discretionary codes as being 9 characters long. For that reason *Take2* will not permit you to enter a code that is longer than 9 characters. TEC staff, bless them, have got into the habit of prefixing discretionary codes with the letters "DA" and sometimes also leading zeros to make them longer than 9 characters. If you are given such a code, for example, "DA00123456", you should just enter "123456" in *Take2* – i.e. remove the "DA" and leading zeros.

- A nasty little bug exists that results in a transaction being notified as processed successfully by TEC but, in fact, failing because you have used an apostrophe, and therefore not being recorded in the TEC database. This could mean, for example, that you report an outcome transaction and get a "SUCCESS" message back from TEC. But, because your outcome comment contained an apostrophe (e.g. you wrote "Learner didn't return"), the outcome will not have been processed by the ERS. TEC claims this bug is being fixed soon but, in the meantime, keep clear of those apostrophes!


Now to the Take2 update:

Users of the ERS will be familiar with the vague messages returned when unsuccessfully attempting to submit a transaction. Sometimes such messages are quite non-specific and so you have no idea what is going on. From *Take2* version 9.1.8 a process of validation has been introduced to trap invalid data being sent to TEC <u>before</u> submission. The method used is to test the data against the XML schema supplied by TEC and notify the user of any value that does not meet the requirements of the schema. The schema is a kind of template that says what is valid and correctly formatted data.

For example, if you had entered an invalid education history code and then submitted the enrol transaction you would see a message like this:
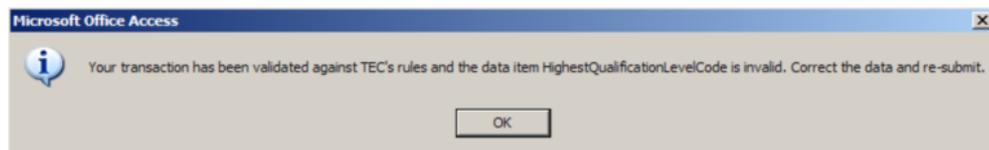
The second new feature is that *Take2* is able to make a record of the XML (i.e. messages) exchanged between *Take2* and the ERS if an error occurs during a transaction. Doing so makes diagnosing the error easier for TEC and Meta Office. So, if an error occurs and you are prompted like this:
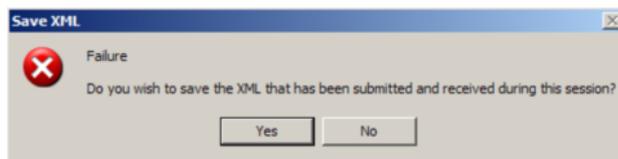
Click *Yes* and the XML is saved into a folder called "ERS_XML" located in the same folder as the *Take2* data file. Zip up the folder and send it to the TEC Help Desk when you discuss the error with them. If they can't sort it out, then send the zip file to us and we will have a look.

To use these new features you must download the latest *Take2* Main Module. Use the *Check for Updates* feature on the *Additional Functionality* screen on the *About System* form, and then follow the instructions.

Also, for the first new feature (validating against the schema) you need to install a copy of the schema on your system. They are available for download from our web site on the *Other Support Files* page (no password required).

Place the download file (ERSSchemaFiles.exe) in the same folder as the *Take2* data file (Take2Data.mdb). You can open this folder by clicking *Open backend location* from the *About* form opened by clicking *Take2 Student Management System* on the *Main Menu*.

Double click on the downloaded file (it is a self-extracting zip file) and unzip it to the backend location folder. You will see that a new sub-folder called "ERS" is created. The schema are stored in that sub-folder.

Remember also to download the latest version of the ERS User Manual from our web site.