

NSI Change

You may have noticed that the URL (web address thingee in plain English) has recently changed for the live NSI. The new address is <https://nsi.education.govt.nz> and so you need to update Take2 to reflect the change.

Open the Administration Module and then the *Site Details* form. Enter the new address in the *Web URL* field as shown in the adjacent screenshot.

ERS

The latest *Take2* Main Module release contains a number of updates to ERS functionality.

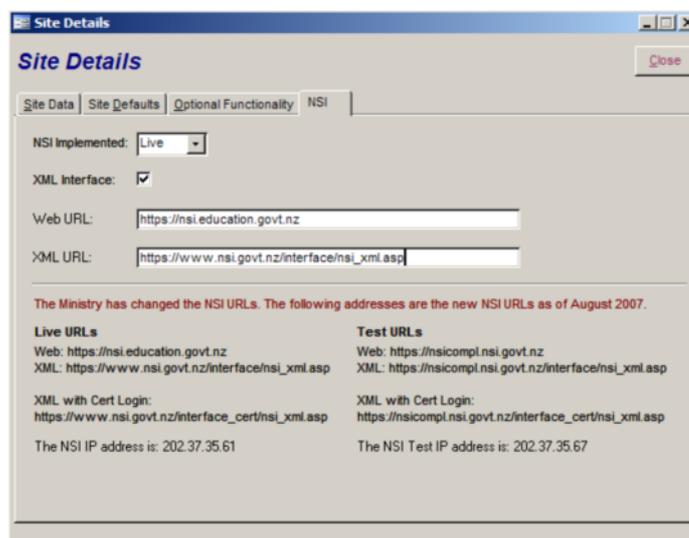
- You can now edit the ERS Status on the *ERS* form.
- You can also edit outcome details.
- The Targeted Summary report has been enhanced to add outcome organisation, class, and tutor fields.

The changes to permit editing of status and outcome have come about because we are finding that it can be quite tricky for users to keep *Take2* synchronised with the data held by TEC.

One particular problem that has cropped up several times recently is the scenario where a trainee withdraws from a programme. You record and report the withdrawal in *Take2* and plan to record and report the outcome in 60 days. In the meantime the trainee signs up on another programme with another provider and that provider registers the enrolment.

At this point TEC automatically enters an outcome for the trainee in the ERS against your programme. If you don't realise that this has been done you may, after 60 days, try to report the outcome yourself and, if you do, you will get an error.

TEC has also clarified to us who you should contact if you have a problem with the ERS. If you are asking a "how to" or a business related question in terms of ERS please contact the Service Centre on 0800 601 301 and for any IT issues related to



the ERS please call 0800 435 737.

Bear in mind, of course, you can always call the *Take2* help desk too.

Glossary

Funding systems are changing again ("student component funding" will be no more from next year but there will be a "student achievement component") and so we thought it may be time to provide a glossary of some of the new terms that TEC will be using.

Here are some that we have come across. Maybe you have some of your own?

- **Enrolment** – a disputed enrolment. You think you can claim funding, TEC thinks you may not.
- **Doubtcome** – a dubious outcome recorded to improve your performance statistics.
- **Insultation** – the type of consultation where the consultor has already made up their mind, irrespective of what the consultee thinks.
- **KPI** – Keep Providing Information.
- **Coarse Register** – an arbitrary classification of components of a qualification that bears no resemblance to academic reality.

Take2 Top Tips – Organisations, Contact Persons, and Students

Take2 can store details of organisations with which you deal. For instance you might want to have details of organisations like secondary schools from which you recruit students, organisations that provide work placement opportunities, or organisations that hire your graduates. If you record outcomes for targeted funding trainees you must have details of organisations associated with trainees' outcome destination.

You can add organisations by clicking *Organisation* on the *Contact* menu in the Main Module. Remember that you can classify organisations by "type", meaning that you can use this as filter option when reporting or selecting persons to contact using a standard letter, email, or text message.

You will find that on the *Organisations* form you can also add what are called "Contacts". These are people who work for an organisation.

An existing person can be made into contact simply by attaching them to the organisation and ticking the *Contact* field on the *Persons* form – see left hand screenshot below.

The screenshot shows the 'Persons' form for Ronald MacDonald. The 'Contact' checkbox is checked. A red arrow points to the 'Contact' checkbox, and another red arrow points to the 'MacDonalds Restaurant' dropdown menu in the 'Organisation' field.

The screenshot shows the 'Student: Smith, Holly Evelyn' form. The 'Contact' checkbox is checked. A red arrow points to the 'Contact' checkbox, and another red arrow points to the 'MacDonalds Restaurant' dropdown menu in the 'Organisation' field.

When you attach a student to an organisation on the *Basic Details* tab of the *Students* form you can, if you wish, also designate which contact person at the organisation should be related to the student – see right hand screenshot above.

Students who are processed through the ERS (electronic receipting system) are attached to an organisation when their outcome is recorded on the *ERS Students* form – see left hand screenshot below.

The screenshot shows the 'ERS Students Form' for Holly Evelyn Smith. The 'Record Outcome' section is visible, with a red arrow pointing to the 'Outcome' dropdown menu, which is currently set to 'EMP'.

The screenshot shows the 'Organisations' form for MacDonalds Restaurant. The 'Students' tab is active, showing a table of students attached to the organisation:

Student Selection	Student's Name	Date of Birth	ID	NSN
<input checked="" type="checkbox"/>	Smith, Holly Evelyn	01/01/1972	3315	12345678

Students will only appear in this list if assigned to this organisation in the students screen.

So, on the *Students* tab of the *Organisations* form you can view students who are directly attached to an organisation (i.e. on the *Students* form), or who are attached to an organisation via an outcome on the *ERS Students* form – see right hand screenshot above.

For those lucky users who use the SQL Server edition of Take2 there are a number of other nice features that assist in managing the relationship with organisations and contact persons; for example organisations can be further classified in various ways, and contact persons can be assigned "roles". This means, for instance, that if you wanted to contact the principals of all secondary schools or the HR Manager of all iron foundries (as you do), then you can do so simply and effectively and, what is more, you can keep a record of your contact history.

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