



Tertiary Education Commission
Te Amorangi Mātauranga Matua

ERS User Guide

for Gateway programmes

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Te Amorangi Mātauranga Matua
Wellington Office
44 The Terrace
Wellington, New Zealand
PO Box 27-048

www.tec.govt.nz

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Introduction

About this user guide

This user guide is for users of the Gateway version of the Electronic Receipting computer system (ERS). There are two versions available:

- this version for Gateway programmes; and
- a separate version for Training Opportunities and Youth Training programmes.

Both are downloadable from [TEC website](#) or from the ERS online help (see [Help](#) for instructions on accessing it).

Getting help

Use the following table to decide where to get help:

STEP	COMMENTS								
1. Check the user guide	The information you need is probably available in this user guide.								
2. If you still need help	<p>If you cannot find what you need in the user guide, then contact one of the following:</p> <table border="1"><thead><tr><th>IF THE PROBLEM RELATES TO ...</th><th>THEN ...</th></tr></thead><tbody><tr><td>Queries around enrolment issues and funding rules</td><td>Refer to the Gateway Handbook for Schools available from the TEC website or Contact the TEC Service Centre on 0800 601 301 or servicecentre@tec.govt.nz</td></tr><tr><td>Technical problems using ERS</td><td>Contact the TEC Service Centre on 0800 601 301 or servicecentre@tec.govt.nz</td></tr><tr><td>Technical problems with ESAA login or the National Student Index</td><td>Contact the Ministry of Education Sector Service Desk at 0800 422 599 or sector.servicedesk@minedu.govt.nz</td></tr></tbody></table>	IF THE PROBLEM RELATES TO ...	THEN ...	Queries around enrolment issues and funding rules	Refer to the Gateway Handbook for Schools available from the TEC website or Contact the TEC Service Centre on 0800 601 301 or servicecentre@tec.govt.nz	Technical problems using ERS	Contact the TEC Service Centre on 0800 601 301 or servicecentre@tec.govt.nz	Technical problems with ESAA login or the National Student Index	Contact the Ministry of Education Sector Service Desk at 0800 422 599 or sector.servicedesk@minedu.govt.nz
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Getting started

Obtaining username and password

You cannot access ERS until you have been set up in ESAA¹. Using your ESAA user id and password also gets you into ERS.

Contact the Ministry of Education Sector Service Desk (0800 422 599 or send an email to sector.servicedesk@minedu.govt.nz) if you need help getting set up in ESAA.

Logging in

You can log into ERS once you have an ESAA username and password. The [Login](#) screen describes how to do this.

Notes:

- You will be automatically logged off if ERS has been inactive for 30 minutes.
- Access to ERS is subject to the privacy conditions described in the Gateway Handbook for Schools (available on the TEC website [here](#)). Each school using ERS is responsible for advising the Ministry of Education Sector Service Desk sector.servicedesk@minedu.govt.nz when a staff member leaves their employment, or moves from the ERS role.

Using ERS

You can start using ERS once you are logged in. The screens are described under the following groupings:

TYPE OF SCREEN	PURPOSE
Programme screens	<p>There are two screens dealing with programmes:</p> <ul style="list-style-type: none">▫ The Programmes List screen lists all the programmes the school is authorised to provide.▫ The Programme Details screen lists the students enrolled in a particular programme. <p>These are the main screens you will use and you will keep returning to them.</p>
Enrolment screens	<p>You will use this series of screens when enrolling a student on a programme. They are accessed via a programme screen.</p>
Other action screens	<p>These are all the other action screens (eg. amend student details). They are also accessed via a programme screen.</p>
Security screens	<p>This group of screens help protect ERS from unauthorised use.</p>

An [overview chart](#) is available showing how the screens all fit together.

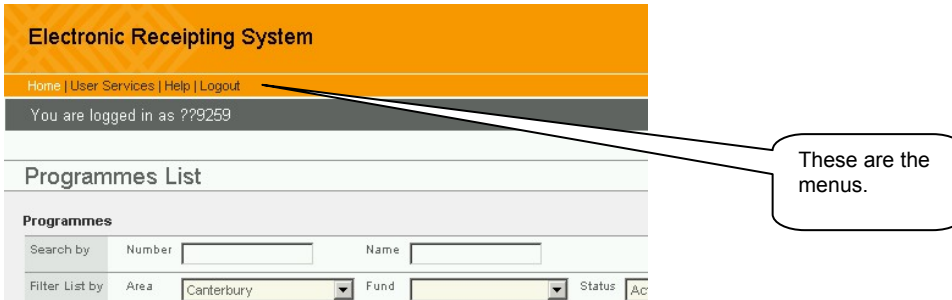
Logging out

Remember to [log out](#) when you have finished.

¹ ESAA stands for “Education sector authentication and authorisation”. It is a web-based service that controls access to many education sector computer systems.

Menus

Menu items are listed across the top of most of the screens like this:

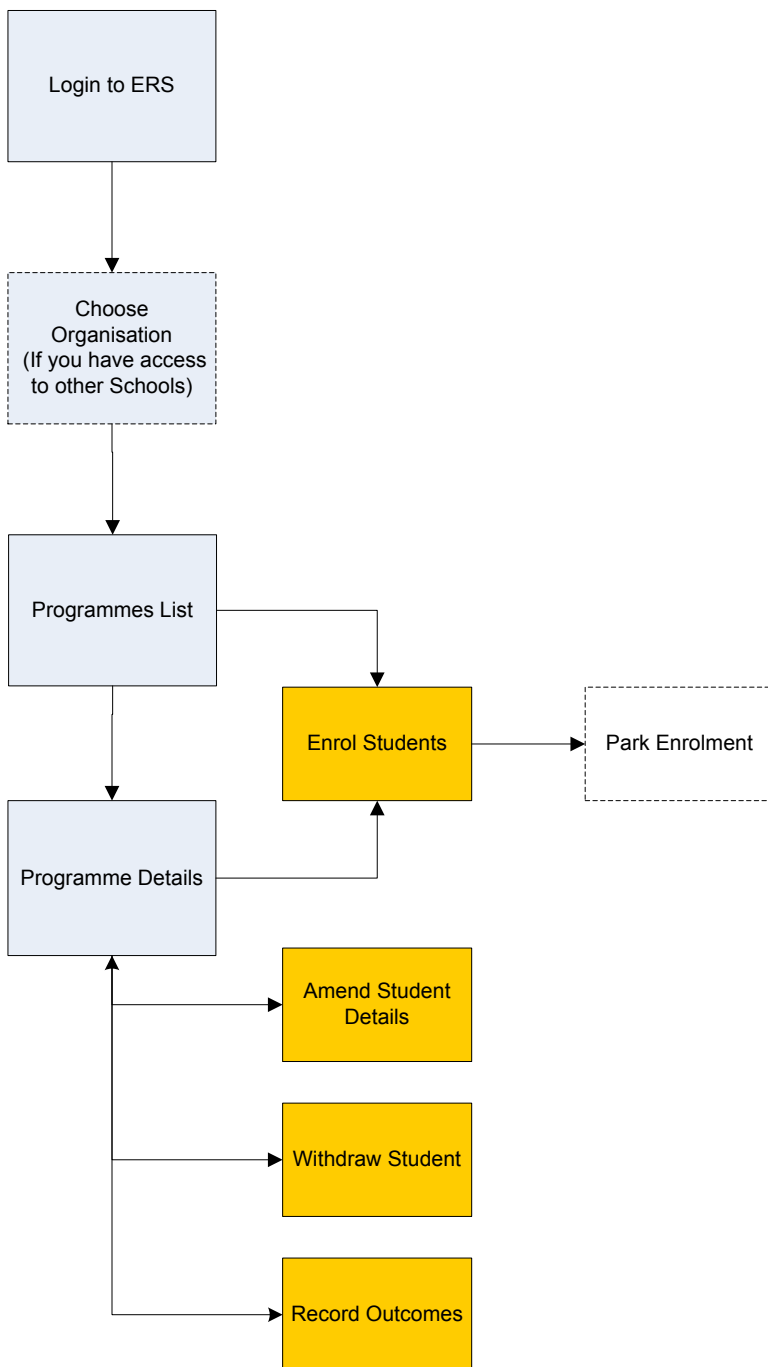


This describes those menu items:

MENU ITEM	COMMENTS
Home	Clicking the Home menu returns you to the Programmes List screen.
User services	<p>Click the User Services menu to change any of the following:</p> <ul style="list-style-type: none"> ▫ Your password. ▫ Your challenge response questions. ▫ Your ESAA profile (see note below). ▫ Change organisation (only appears if you have authorisation to act on behalf of more than one organisation). <p>NOTE: “ESAA stands for Education sector authentication and authorisation”. It is a web-based service that controls access to many education sector systems. You cannot access ERS until you have been set up in ESAA.</p>
Help	<p>Clicking the Help menu displays a page from which you can download this user guide.</p> <p>Make sure you choose the ERS Help menu like this:</p>
Log out	<p>Clicking the Log out menu logs you out of ERS. See Logout screen for more detail.</p> <p>IMPORTANT: Always log out when you have finished to avoid unauthorised access to ERS.</p>

Screens: Overview chart

This shows how the various screens link together:



Screens: Programmes

This section describes the two screens that list programmes and their details. They are the main screens you will use.

Programmes List screen

Use the Programmes List screen to display:

- All the programmes the school is authorised to provide.
- All “parked” enrolments. (You can park an enrolment partway through data entry if you need to clarify data or obtain missing data before continuing. Everything you have entered so far will be saved).

The Programmes List screen first appears on logging in (see [Login screen](#)). In many situations, you will return to it after using making changes via the [Action](#) screens. Either:

- Search: Enter the Programme number or programme name or part of the name
- Filter the list: Limit the display by selecting filters from the drop down lists

The screenshot shows the ERS interface. At the top, it says "Electronic Receiving System" and "You are logged in as helpdesk". The page title is "Programme List" for "3 - Kaitia College".

Programmes

Search by: Number Name Search

Filter List by: Area Fund Status Filter

No.	Name	Fund	Start	Status	Active Learners	Maximum Learners	
21060037	Gateway	GATEW	06/02/2006	Active	65	95	Enrol

Parked Enrolments

NSN	First Name	Last Name	Programme Number	Comment	Date Parked	User Id		
1234567890	Joe	Blows		wibble	02/05/2007, 11:01	helpdesk	Select	Delete
1234567891	Fred	Blows	21060037	klfjhsadklfjh	01/05/2007, 11:11	helpdesk	Select	Delete

NOTE: You can display a programme's details by clicking its number.

Callouts in the image:

- "Always check that you have the correct school." (points to the school name)
- "Most schools have only one programme. However, if you have more than one, you can use this area to SEARCH for a programme, or to FILTER the display to restrict the list to programmes meeting certain criteria." (points to the search and filter sections)
- "This area lists all programmes the school is approved for. You can make it shorter by searching or filtering." (points to the programmes table)
- "This area lists any parked enrolments." (points to the parked enrolments table)

Clicking on the programme number (on the left) displays the [Programme Details](#) screen where you can:

- View detailed information about a programme (start and end dates, number enrolled and maximum permitted and list of students).
- Enrol a new student in a programme.
- Resume data entry for a parked enrolment.

FIELD, BUTTON, LINK	COMMENTS
SEARCH AREA	
Number	Programme number.
Name	Part or all of the programme name.
Search button	Click this to execute the search. The programmes list changes to reflect the search criteria. NOTE: ERS will take you directly to the Programme Details screen if there is only one programme in the search result.
Reset button	Click this to clear the search fields.
FILTER AREA	
Area	Eg. Northland.
Fund	Gateway.
Status	Active / Pending / Complete.
Filter button	Click this to execute the filter. The programmes list changes to reflect the filter criteria.
Reset button	Click this to clear the filter fields.
PROGRAMMES LIST	
Number Name	List of all programmes you are approved for. You can make it shorter by searching or filtering.
Number link	The programme number is also a link. Click it to see detailed information about the programme. The Programme Details screen appears.
Enrol link	Click this to enrol a new student in the programme. The Student Details screen will appear. NOTE: Remember to take parked enrolments into account when deciding whether to accept additional enrolments.
PARKED ENROLMENTS	
NSN First name	List of all parked enrolments.
Select link	Click this to restart enrolment of the new student. The Student Details screen will appear.
Delete link	Click this to delete a parked enrolment started in error. You will be asked to confirm the deletion. If you delete the enrolment all of its data will be lost.

Programme Details screen

Use the Programme Details screen to display detailed information about a particular programme including:

- Fund, start and end dates, and programme status.
- Number of students currently enrolled in the programme and the maximum permitted.
- List of students.

Starting at the Programme Details screen, you can:

- Enrol a new student.
- Amend a student's details.
- Delete a student when it is the same day as the student was enrolled.
- Withdraw a student from the programme.
- Record the outcome for a student.

The Programme Details screen appears after clicking the programme [number](#) in the Programmes List screen.

Always check that you have the correct programme.

Click this link to enrol a new student.

...or click one of these links to amend student details, withdraw or delete them or record an outcome.

Fund	Programme Start Date	Programme End Date	Status	Payment Cycle
GATEW	08/02/2010	14/02/2010	Pending	A

There are no recesses.

Learners

Number of learners currently enrolled is 2 out of a maximum of 12

NSN	First Name	Last Name	Start Date	End Date	Outcome
0132830639	Peter	Jones	10/02/2010		
0133612981	Janelle	Smith	08/02/2010		

FIELD, BUTTON, LINK	COMMENTS
SUMMARY DETAILS (AT TOP)	
Fund Programme start date Programme end date	High-level details about the programme.
STUDENTS	
Number of students currently enrolled	Number of students currently enrolled in the programme and maximum permitted.
Enrol link	Click this to enrol a new student in the programme. The Student Details screen will appear. NOTE: Remember to take parked enrolments into account when deciding whether to accept additional enrolments.
LIST OF STUDENTS	
NSN First name Last name	List of all students enrolled in this programme.
Amend link	Click this to amend student details. The Amend Student Details screen will appear.
Delete Placement link	Click this to delete a student enrolled in error. The Delete Placement screen will appear. Notes: <ul style="list-style-type: none"> ▫ The option of “deleting” a student is available only if the programme has not yet started OR the student was enrolled today. (Otherwise you are given the option of “withdrawing”). ▫ After deleting a student from a programme the student will no longer show as an active enrolment.
Withdraw link	Click this if the student is withdrawing from a programme before the programme-end date. The Withdrawal screen appears. IMPORTANT: Complete a “Placement in error” form if you are withdrawing a student as the result of a placement error. The TEC will use the information you provide to help identify any payment adjustments that may be needed. (The form is available on the TEC website here). NOTE: The option of “withdrawing” a student is available only if the programme has started AND the student was enrolled before today. Otherwise you are given the option of “deleting”.
Record Outcome link	Click this to add an outcome for the student. The Record Outcome screen will appear. Notes: <ul style="list-style-type: none"> ▫ This cannot be done until three months after withdrawal. ▫ Only TEC will be able to change the outcome after it has been submitted.

Screens: Enrolment

This section describes the enrolment screens. These are the series of screens that appear when you enrol a student in the Gateway programme.

NOTE: The screens are described in their order of appearance.

-Student Details screen

Use the Student Details screen to:

- download student details from the National Student database; and
- enter student contact details.

Display it by:

- clicking an [Enrol](#) or [Select](#) link in the Programmes List screen; or
- clicking the [Enrol](#) link in the Programme Details screen.

The screenshot shows the 'Gateway Enrolment - Student Details' screen. At the top, there is a navigation bar with 'Home | User Services | Discretionary Approval | Help | Logout' and a status bar indicating 'You are logged in as helpdesk'. The main content area is titled 'National Student Index Details' and contains several input fields and buttons. Callouts 1 through 4 provide instructions on how to use the screen: 1. Enter the National Student Number (1234567890) and date of birth (14/12/1985). 2. Click the 'Lookup NSN' button. 3. The remaining fields (Name, Gender, Address, Contact phone number) update automatically. 4. Click the 'Next' button.

FIELD, BUTTON, LINK	COMMENTS
National Student Number	You cannot enrol a student without the NSN.
Date of birth Name Gender	Fields will automatically populate when you click the Lookup NSN button if the information is available in the National Student Index.

FIELD, BUTTON, LINK	COMMENTS
Lookup NSN button	Click this after entering the NSN and date of birth. The remaining fields will automatically fill if the information is available in the National Student Index.
Clear NSN button	Click this to clear the NSN and start again.
Street Suburb Town / City Contact phone number Other phone number	Information will automatically populate when you click the Lookup NSN button if the student has previously been enrolled on a TEC funded programme. Amend as appropriate.
Next button	Click this to move to the next screen.
Park button	Click this if you need to “park” the enrolment while you clarify details or obtain missing information. The Parking screen will appear. NOTE: Parking an enrolment saves data from all four of the enrolment screens not just the one you are looking at.
Cancel button	Click this to cancel the enrolment. All information entered will be lost.

Statistical Information screen


Use the Statistical Information screen to enter statistical information such as ethnic group, employment history and so on. The screen appears after clicking the [Next button](#) in the Student Details screen:

The screenshot shows the 'Statistical Information' screen in the Electronic Receiving System. It includes a header with 'Electronic Receiving System' and navigation links. The main content area has four sections: 'Year at School' (a dropdown menu with '12' selected), 'Ethnic Group' (a multi-select dropdown with 'Maori' selected), 'Main tribal group' (a dropdown menu with 'Hauraki (Coromandel) Region, not further defined' selected), and 'Other tribal affiliations' (a multi-select dropdown with 'Hauraki (Coromandel) Region, not further defined' selected). At the bottom are buttons for 'Back', 'Next', 'Park', and 'Cancel'. Four callout boxes provide instructions: 1. Select the student's school year. 2. Select one or more ethnic groups. 2. If your selections include New Zealand Māori you must also specify a main tribal group... 3. ...plus any other tribal affiliations. 4. Then click the Next button.

FIELD, BUTTON, LINK	COMMENTS
Year at school	Select the student's school year.
Ethnic group	Select one or more by holding down the Ctrl key.
Main tribal group	Select from the drop-down list (only if your selections included New Zealand Māori).
Other tribal affiliations	Select any other tribal affiliations. To select multiples: <ul style="list-style-type: none"> ▫ select the first one; ▫ press the Ctrl key and keep holding it down while you click your second selection; ▫ keep doing this until you have selected all the required affiliations. <p>WARNING: You will have to start again if you forget to hold the Ctrl key down.</p>
Back button	Click this to return to the previous screen. (You will not lose what you have entered.)
Next button	Click this to move to the next screen.
Park button	Click this if you need to “park” the enrolment while you clarify details or obtain missing information. The Parking screen will appear. <p>NOTE: Parking an enrolment saves data from all four of the enrolment screens not just the one you are looking at.</p>
Cancel button	Click this to cancel the enrolment. All information entered will be lost.

Placement Details screen

Use the Placement Details screen to enter information about the placement. The screen appears after clicking the [Next button](#) in the Statistical Information screen:

Electronic Receipting System 

Home | User Services | Discretionary Approval | Help | Logout

You are logged in as helpdesk

Gateway Enrolment - Placement Details

Placement Employer

Employer: *
 Industry: *

NOTE: Editing these fields will change the employer details for [this placement only](#).

Employer Contact:
 Contact Phone: ()
 Address:

Duration of Placement

Learner Start Date: / / *
day month year

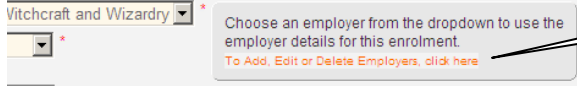
Proposed Duration (Weeks):
 Proposed Hours Per Week:

1. Select the employer and their industry. (NOTE: Also see "To add, edit, delete..." in the table below).

2. On selecting the employer, their details appear here. Make any corrections as necessary.

3. Complete these details.

4. Then click the Next button.

FIELD, BUTTON, LINK	COMMENTS
Employer	Select the employer.
Industry	Select the industry the employer fits within.
To add, edit, delete ...	<p>Sometimes you will need to:</p> <ul style="list-style-type: none"> ▫ add a new employer to the list; or ▫ edit employer details; or ▫ delete an employer. <p>To do this, click the red link on the right of the screen:</p>  <p>Click the red link.</p> <p>The Maintain Employers screen will appear.</p>
Employer contact Contact phone Address	This information is automatically filled when you select the employer / industry if previously entered. (See page 22) Amend as appropriate.
Student start date	Date the student started the employment.
Proposed duration	Proposed duration of the employment (in weeks).
Proposed hours per week	Proposed hours per week during the employment.

FIELD, BUTTON, LINK	COMMENTS
Back button	Click this to return to the previous screen. (You will not lose what you have entered.)
Next button	Click this to move to the next screen.
Park button	<p>Click this if you need to “park” the enrolment while you clarify details or obtain missing information. The Parking screen will appear.</p> <p>NOTE: Parking an enrolment saves data from all four of the enrolment screens not just the one you are looking at.</p>
Cancel button	Click this to cancel the enrolment. All information entered will be lost.

Learning plan

The Learning Plan screen looks like this if nothing has been added to the indicative learning plan:

The empty screen looks like this.

Click this button to add a unit standard to the list.

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Home | User Services | Discretionary Approval | Help | Logout

You are logged in as helpdesk

Gateway Enrolment - Learning Plan

Indicative Learning Plan

Number	Title	Level	CreditValue	Assessment
Add Unit Standards...				

Back Finish Park Cancel

It looks like this after adding unit standards:

After adding unit standards, the screen looks like this.

To remove a unit standard from the list click its Remove button.

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Home | User Services | Discretionary Approval | Help | Logout

You are logged in as helpdesk

Gateway Enrolment - Learning Plan

Indicative Learning Plan

Number	Title	Level	CreditValue	Assessment
231	Explain the operation of two and four stroke petrol and diesel engines	2	4	Work * Remove
908	Test a two stroke and a four stroke diesel engine to determine their condition	4	4	School * Remove
2313	Repair fuel injection pump drives on diesel engines	4	4	Shared * Remove
Add Unit Standards...				

Back Finish Park Cancel

FIELD, BUTTON, LINK	COMMENTS
Assessment column	Select "Work", "School", or "Shared" from the drop-down list to indicate where the assessment is most likely to occur.
Remove button	Click this to remove a unit standard from the list.
Add Unit Standards button	Click this to add a unit standard to the list. The Find Unit Standards screen will appear.
Back button	Click this to return to the previous screen. (You will not lose what you have entered).
Finish button	Click this to move to the next screen.

FIELD, BUTTON, LINK	COMMENTS
Park button	Click this if you need to “park” the enrolment while you clarify details or obtain missing information. The Parking screen will appear. NOTE: Parking an enrolment saves data from all four of the enrolment screens not just the one you are looking at.
Cancel button	Click this to cancel the enrolment. All information entered will be lost.

Confirmation screen – number one

The second to last screen for an enrolment is the confirmation screen number one. This screen provides a last chance to check everything you have entered and certify that it is correct. The screen appears after clicking the [Next button](#) in the Learning Plan screen and lists all the information entered on the four previous screens:

Electronic Receipting System

Home | User Services | Discretionary Approval | Help | Logout

You are logged in as helpdesk

Gateway Enrolment - Confirmation Page

Personal and Contact Information

NSN	1234567890
Name	Joe Blows
Date of birth	14/12/1985
Gender	female
Address	1 Penny Lane Karori Gisborne
Contact phone number	(06) 1112223
Other phone number	

Ethnicity

Ethnic Groups	Maori
---------------	-------

Provider Declaration

I confirm that:

- I have completed and signed the declarations required by the learner's enrolment form.
- The information I am submitting is complete and is exactly as it appears on the learner's enrolment form of any obvious typographical errors (which have been noted on the enrolment form).

Please declare the above to be true: *

Completed by: ??9646
Completed on: 7/17/07 11:48 AM

FIELD, BUTTON, LINK	COMMENTS
Please declare the above to be true	Select this field only if all the data entry is correct.
Submit button	Click this to submit the enrolment. Notes: <ul style="list-style-type: none"> The screen will not appear to change however the top and the bottom of the page has. Refer to Confirmation Screen – number two
Back button	Click this to return to the previous screen. (You will not lose what you have entered).
Park button	Click this if you need to “park” the enrolment while you clarify details or obtain missing information. The Parking screen will appear. NOTE: Parking an enrolment saves data from all four of the enrolment screens not just the one you are looking at.
Cancel button	Click this to cancel the enrolment. All information entered will be lost.

Confirmation screen – number two

The last screen for an enrolment is the confirmation screen number two. The screen appears after clicking the [Submit Button](#). The content of the enrolment details remains the same however the top and bottom of the page has changed.

The top of the page instructs you to print the screen for audit purposes and allows you to close the enrolment screen or enrol another student on the same programme.

At the bottom of the screen the Submit, Back, Park and Cancel buttons have been replaced by the options to close the enrolment screen or enrol another student on the same programme.

1. Print the screen.
THIS IS IMPORTANT. See "Printout for audit purposes"

2. Click this to enrol another student on the same programme

3. Click this to return to the Programme Details Screen

The screenshot shows the 'Gateway Enrolment - Confirmation Page' for Oliver William Smith. It includes sections for Personal and Contact Information, Ethnicity, General Information, Placement Details, and Learning Plan. At the top, there are navigation links and a login status. A callout points to a 'Print' button with the text 'THIS IS IMPORTANT. See "Printout for audit purposes"'. Another callout points to a button labeled 'Enrol Another Student On Same Programme'. A third callout points to a 'Close' button.

4. Click this to enrol another student on the same programme

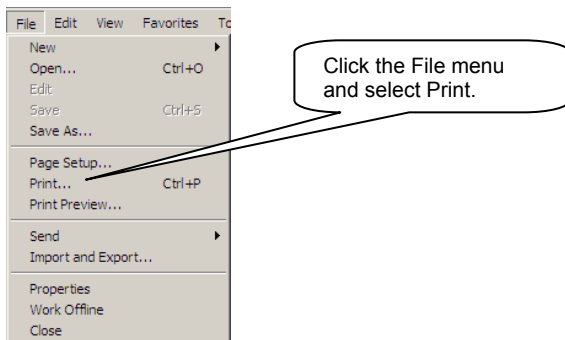
5. Click this to return to the Programme Details Screen

The screenshot shows a detailed view of the Learning Plan section. It contains a table with columns for Number, Title, Level, Credits, and Assessment. Below the table is a 'Provider Declaration' section with a 'Confirm that' checkbox and a 'Completed on' date of 04/02/2010. Callouts point to the 'Enrol Another Student On Same Programme' and 'Close' buttons at the bottom of the page.

Number	Title	Level	Credits	Assessment
1978	Identify basic employment rights and responsibilities, and sources of information and assistance	1	2	School
750	Demonstrate knowledge of electrical test instruments and take measurements	2	2	Work
15844	Select and install flexible cords	2	3	Work
15845	Draw and explain simple electrical diagrams	2	4	Shared
15848	Demonstrate knowledge of safeguards for use with portable electrical appliances	2	2	Work
15849	Perform manual soldering and de-soldering procedures for electrotechnology work	2	2	Work

Printout for audit purposes

Printing is a crucial step and mandatory for auditing purposes so ensure you keep the printout on your Gateway files. This is how you print the screen:



NOTE: The File menu may look slightly different if you are not using Microsoft Internet Explorer.

FIELD, BUTTON, LINK	COMMENTS
Enrol Another Student	Click this return to the Student Details Screen enrolment.
Close	Click this to return to the Programme List

Screens: Other actions

This section describes the screens you will use to take other actions (such as amending student details). The screens are listed in alphabetical order.

Add / Edit Employer screen

This section describes two nearly identical screens, as follows:

SCREEN	NOTES
Add Employer	Use the Add Employer screen to enter a new employer's details. The screen will appear after clicking the Add New Employer button in the Maintain Employers screen.
Edit Employer	Use the Edit Employer screen to modify an existing employer's details. The screen will appear after clicking the Edit Employer button in the Maintain Employers screen.

The Add Employer screen looks like this (the Edit Employer screen is nearly identical):

The screenshot shows the 'Gateway Enrolment - Add Employer' screen. The form includes the following fields and options:


- Employer Name: The Galactic Empire
- Contact: Darth Vader
- Contact Phone: (09) 9999999
- Address Line 1: The Death Star
- Address Line 2: High Orbit
- Suburb/Locale: (empty)
- Town/City: Alderaan
- Industries this Employer provides Gateway training in: A list of industries including Agriculture, Aluminium Joinery (architectural), Animal care, Aviation, Baking, Boat building, Building & construction, Business Administration, Computing, Contracting, Dairy manufacturing, and Education.
- Buttons: Save Employer and Cancel

Callout boxes indicate: 1. Enter or correct employer details. 2. Click the Save Employer button.

FIELD, BUTTON, LINK	COMMENTS
Employer name	The employer (company) name.
Contact	Contact person.
Contact phone	Phone number of the contact person.
Address Line 1 Address Line 2 Suburb / Locale Town / City	Address details.
Industries this employer provides Gateway training in	Select one or more industries.
Save Employer button	Click this to save employer details.
Cancel button	Click this to cancel your data entry. All information you have just entered into the screen will be lost.

Amend Student Details screen

Use the Amend Student Details screen to modify a student's previously-entered details (which were first entered when enrolling the student into this particular programme). Display the screen by clicking an [Amend](#) link in the Programme Details screen.

Electronic Receiving System 

Home | User Services | Discretionary Approval | Help | Logout

You are logged in as helpdesk

Amend Learner 21060037 - Gatev

Personal Details

NSN: 1234567890
Name: Joe Blows

Address

Street 1: *

Suburb:
Town/city: *
Contact phone number: () *
Other phone number: ()

Gateway Placement Details

Select Employer: *
Industry: *
Choose an employer from the list to use the employer details for this amendment.
To Add, Edit or Delete Employers, click here

NOTE: Editing these fields will change the employer details for this placement only.

Employer: *
Employer Contact: *
Contact Phone: () *
Address Line 1: *
Address Line 2:
Suburb/Locale:
Town/City: *

Indicative Learning Plan

Number	Title	Lev	CreditValue	Assessment	
6569	Prepare and present basic baking, pastry, and dessert items		10	<input type="text" value="Work"/>	<input type="button" value="Remove"/>
6570	Prepare and present baking, pastry, and dessert items		25	<input type="text" value="Work"/>	<input type="button" value="Remove"/>

Provider Declaration

I confirm that:

- I have completed and signed the declarations required by the learner's enrolment form.
- The information I am submitting is complete and is exactly as it appears on the learner's enrolment form and supporting documents, and I have corrected any obvious typographical errors (which have been noted on the enrolment form).

Please declare the above to be true: *

Completed by: helpdesk
Completed on: Thu Jul 26 12:03:26 NZST 2007

1. Add information and amend the screen as appropriate.

2. Select (tick) this field to certify that all information entered is correct when you are ready to save.

3. Click Save Amendment to save the changes.

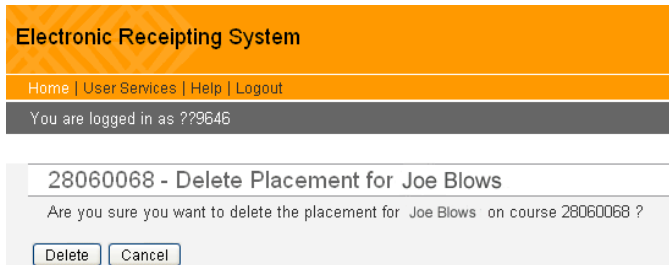
NOTE: Once a student has been withdrawn from a programme it is only possible to the amend address and phone number.

FIELD, BUTTON, LINK	COMMENTS
PERSONAL DETAILS	
NSN Name	Use this information to confirm you have selected the correct student.
ADDRESS	
Street Suburb Town / City Contact phone number Other phone number	Student address and contact details.
GATEWAY PLACEMENT DETAILS	
This section of the screen works exactly the same way as the Placement Details screen (one of the enrolment screens).	
INDICATIVE LEARNING PLAN	
This section of the screen works exactly the same way as the Learning Plan screen (one of the enrolment screens).	
BOTTOM OF SCREEN	
Please declare the above to be true	Select this field only if all the information is correct.
Save Amendment button	Click this to save the changes.
Cancel button	Click this to cancel the amendment. All information entered will be lost.

Delete Placement screen

The Delete Placement screen is used to confirm a deletion. An enrolment may only be deleted if the student has been enrolled on the same day as you are deleting the enrolment or when the programme has not started.

The screen appears after clicking a [Delete Placement](#) link in the Programme Details screen:



The screenshot shows the 'Electronic Receipting System' interface. At the top, there is an orange header with the text 'Electronic Receipting System'. Below this is a navigation bar with links for 'Home', 'User Services', 'Help', and 'Logout'. A grey bar indicates the user is logged in as '??9646'. The main content area has a title '28060068 - Delete Placement for Joe Blows' and a confirmation message: 'Are you sure you want to delete the placement for Joe Blows on course 28060068?'. At the bottom of the form are two buttons: 'Delete' and 'Cancel'.

Find Unit Standards screen

Use the Find Unit Standards screen to select unit standards to add to the indicative learning plan. Display the screen by clicking the Add Unit Standards button in one of the following screens:

- [Amend Student Details](#)
- [Learning Plan](#) (one of the enrolment screens)

Use the Find Unit Standards screen like this:

The screenshot shows the 'Find Unit Standards' interface. It includes a search bar for 'Unit Standard Id', a section for 'OR' search criteria with fields for 'Title Keywords', 'Min Credits', 'Max Credits', 'Min Level', and 'Max Level'. There are also dropdown menus for 'Field' and 'Sub-Field'. A 'Search' button is present. Below the search fields, there is a table of results with columns for 'Id', 'Title', 'Level', 'Merit', 'Excellence', 'Field', and 'Domain'. The table shows 14 matching standards found. Callouts provide instructions: 1. Enter the unit standard id OR...; 2. When you click the Search button...; 3. Select (tick) the unit standards you want to add to the indicative training plan.; 4. Click the Add Unit Standards button to return the screen you came from when ready. ERS will add the standards you selected to the indicative training plan.

FIELD, BUTTON, LINK	COMMENTS
Unit standard id	The unit standard id.
Title keywords	One or more words to search for in the title of the unit standard.
Min credits Max credits	Use these to limit the search to unit standards with a certain number of credits.
Min level Max level	Use these to limit the search to unit standards at a certain level.
Field / Sub-field / Domain	Select from the drop-down lists.
Search button	Click this to execute the search.
Reset Search button	Click this to clear all the search fields.
Cancel button	Click this to cancel the search. You will be returned to the screen you came from and nothing will be added to the indicative learning plan.
Add Unit Standards button	Click this to add the standards you selected to the indicative training plan. You will be returned to the screen you came from.

Maintain Employers screen

Use the Maintain Employers screen to:

- add a new employer to the list; or
- edit an existing employer's details; or
- delete an existing employer.

Display the screen by clicking the "To add, edit, delete..." link in one of the following screens:

- [Amend Student Details](#)
- [Placement Details](#) (one of the enrolment screens).

Use the screen like this:

The screenshot shows the 'Electronic Receipting System' interface. At the top, there is an orange header with the system name and a navigation bar with links for 'Home', 'User Services', 'Discretionary Approval', 'Help', and 'Logout'. Below this, a grey bar indicates the user is logged in as 'helpdesk'. The main title is 'Gateway - Maintain Employers'. On the left, there is a search box containing 'Batman' and a list of employers, with 'Hogwarts School of Witchcraft and Wizardry' selected. To the right of the list are three buttons: 'Add New Employer...', 'Edit Employer', and 'Delete Employer'. Below these buttons is a note: 'NOTE: Editing or deleting the details for an employer will not affect existing placements for that employer; only subsequent placements will be affected or amendments.' At the bottom left, there is a 'Back' button. Four callout boxes provide instructions: 1. 'Click this button to add a new employer...' points to the 'Add New Employer...' button. 2. 'OR click on one of the employers in the list THEN click this button to edit their details...' points to the 'Edit Employer' button. 3. 'OR click on one of the employers in the list THEN click this button to delete that employer.' points to the 'Delete Employer' button. 4. 'Click the Back button to return to the screen you came from when you have finished.' points to the 'Back' button.

Parking screen

Use the Parking screen to “park” an enrolment partway through data entry. You would do this if you need time to clarify data or obtain missing data before continuing.

The screen appears after clicking the Park button on any of the [enrolment](#) screens:

The screenshot shows the 'Electronic Receipting System' header in orange. Below it is a navigation bar with links: Home | User Services | Discretionary Approval | Help | Logout. A status bar indicates 'You are logged in as helpdesk'. The main title is 'Gateway Enrolment - Parking'. A text input field is labeled 'Comment (why you are parking the form):' and contains the text 'Waiting for further information'. At the bottom are two buttons: 'Park this form' and 'Cancel'. Two callout boxes are present: one pointing to the comment field with the text '1. Explain why you are parking the enrolment.', and another pointing to the 'Park this form' button with the text '2. Then click the “Park this form” button.'

Notes:

- Parking an enrolment saves information you have entered on all four of the enrolment screens not just the one you clicked the Park button in.
- Remember to update the student start date when you “un-park” an enrolment.

FIELD, BUTTON, LINK	COMMENTS
Comment	Explain why you are parking the enrolment (eg. Waiting on confirmation from employer).
Park this form button	Click to confirm that you want to park the enrolment. The screen you originally came from will appear (Programmes List or Programme Details).
Cancel button	Click to cancel the “parking”. All information entered into this screen will be lost.

Record Outcome screen

The Record Outcome screen is used to record each student's labour market outcome.

NOTE: ERS will not allow you to do this until three months after withdrawal.

The screen appears after clicking a [Record Outcome](#) link in the Programme Details screen.

The screenshot shows the 'Record Outcome' screen in the Electronic Receiving System. At the top, there is a navigation bar with 'Home | User Services | Discretionary Approval | Help | Logout' and a status bar indicating 'You are logged in as helpdesk'. The main heading is 'Record Outcome'.

The form is divided into several sections:

- Personal Details:** Includes fields for NSN (0113596466), Name (Shay Wilfred Wright), Learner start date (12/4/2006), and Learner end date (12/4/2006).
- Learner Destination:** Has three tabs: 'Employment', 'Further Training', and 'Other'. The 'Employment' tab is selected.
- Employment Outcome:** A drop-down menu with a red asterisk.
- Employer Details:** Includes fields for Employer name, Contact person, Contact phone number, Fax number, and E-Mail, all with red asterisks. There is also a 'Comments' text area.
- Buttons:** 'Add Another Employer', 'Save Outcome', and 'Cancel'.

Three callouts provide instructions:

1. Enter all relevant data into the screen.
IMPORTANT: Make sure you complete the correct tab.
2. Click this button if there is more than one employer and then complete the additional fields that appear.
3. When you finished entering everything click the Save Outcome button.

NOTE: Which fields are visible depend on which tab you select (Employment / Further training / Other).

FIELD, BUTTON, LINK	COMMENTS
TOP OF SCREEN	
NSN Name Student start date Student end date	Use this information to confirm you have selected the correct student.
EMPLOYMENT TAB	
Employment outcome	Select the labour market outcome from the drop-down list.
Contact person Contact phone number Fax number Email	Contact person at the employer and their contact details.

FIELD, BUTTON, LINK	COMMENTS
Comments	Any additional comments you would like to make about the outcome.
Add Another Employer button	Click this if there is more than one employer. More fields appear allowing you to enter the second employer.
Remove button	Only visible if more than one employer has been entered. Click this button to remove the employer.
FURTHER TRAINING TAB	
Training outcome	Select from the drop-down list.
Name of training organisation	Name of the training organisation.
Contact person Contact phone number Fax number Email	Contact person at the training organisation and their contact details.
Comments	Any additional comments you would like to make about the outcome.
OTHER TAB	
Other outcome	Select from the drop-down list.
Comments	Any additional comments you would like to make about the outcome.
BOTTOM OF SCREEN	
Save Outcome button	Click this to save the outcome.
Cancel button	Click this to cancel the outcome. All information entered will be lost.

Withdrawal screen

IMPORTANT: If you are using this screen to withdraw an enrolment made in error you must also send a "[Enrolment in error](#)" form to the TEC Service Centre.

Use the Withdrawal screen if a student is withdrawing from a programme before the programme end date. The screen appears after clicking a [Withdraw](#) link in the Programme Details screen.

The screenshot shows the 'Gateway Withdrawal' screen. At the top, there is a navigation bar with 'Electronic Receipting System', 'Home | User Services | Discretionary Approval | Help | Logout', and 'You are logged in as helpdesk'. Below this is the title 'Gateway Withdrawal'. The main content area is divided into two sections: 'Personal Details' and 'Withdrawal Details'.
Personal Details:
 NSN: 1234567890
 Name: Joe Blows
 Learner start date: 25/07/2006
Withdrawal Details:
 Withdrawal date: 29/07/06 (with dropdowns for day, month, year)
 Workplace learning placement proceeded as anticipated? Yes No
 If No, reason placement did not proceed as anticipated: [Text area]
 At the bottom are 'Save Withdrawal' and 'Cancel' buttons.

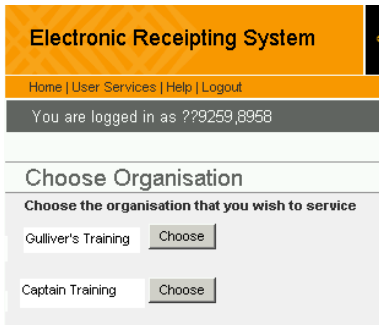
FIELD, BUTTON, LINK	COMMENTS
NSN Name Student start date	Use this information to confirm you have selected the correct student.
Withdrawal date	Date of withdrawal.
Workplace learning placement proceeding as anticipated	Select Yes or No. If No enter the reason.
Save Withdrawal button	Click this to save the withdrawal.
Cancel button	Click this to cancel the withdrawal. All information entered will be lost.

Screens: Security

This group of screens help protect ERS from unauthorised use. The screens are listed in alphabetical order.

Choose Organisation screen

This screen only appears if the user has authorisation to act on behalf of more than one organisation. For those users, the Choose Organisation screen appears after clicking the [Login](#) button in the Login screen:



Click the Choose button next to the school you want to work as. The [Programmes List](#) screen appears.

NOTE: You can only be logged in to one school at a time.

Change an organisation when already logged in

To change school when you are already logged in:

- Click the [User Services](#) menu
- Select “Change your currently selected organisation”

Login screen

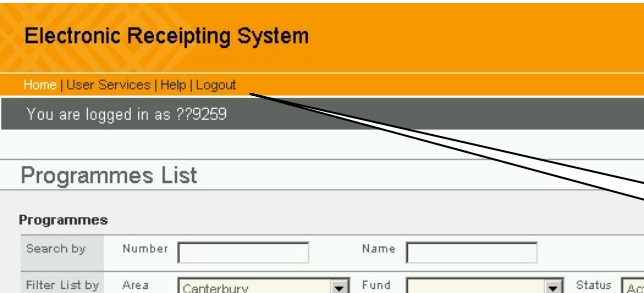
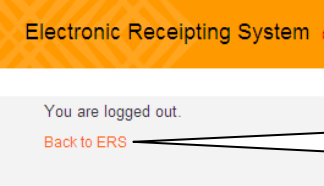
Use the Login screen to log into ERS. Enter the following address in your web browser (Internet Explorer or similar) to display it: <http://service.tec.govt.nz>

The login screen appears like this:

FIELD, BUTTON, LINK	COMMENTS
Username	Enter your username. (Obtaining username and password describes how to obtain a username and password.)
Password	Enter your password. Notes: <ul style="list-style-type: none"> ▫ See Obtaining username and password if you do not have a username and password. ▫ Use the Forgotten Password link (see below) if you have a username but have forgotten your password.
Login button	Enter your username and password and then click to log in. Notes: <ul style="list-style-type: none"> ▫ For users set up to work on only one school, the Programmes List screen appears. But for users set up to work on multiple schools, the Choose Organisation screen appears. ▫ You will be automatically logged off if you stop using ERS for 30 minutes. You will lose any information you have not parked.
Clear button	Click to remove all text from the Username and Password fields.
Forgotten Password link	Click if you have forgotten your password. The Forgotten Password screen appears.

Logout screen

Log out of ERS like this:

ACTION	COMMENTS
1. Click the Logout menu item	
2. Logout screen appears	<p>After clicking the Logout menu item the Logout screen appears:</p> 

IMPORTANT: Always log out when you have finished to avoid unauthorised access to ERS.

Quick reference

This summarises how to carry out various tasks in ERS:

TOPIC	ACTION	HOW TO DO IT
Challenge phrase	Change	Click User Services menu, then click "Change your challenge phrase".
Enrolment	Amend student details	Click Amend link next to the student (in the Programme Details screen).
	Delete placement	Click Delete Placement link next to the student (in the Programme Details screen). You may only delete an enrolment the same day or when the programme has not yet started. If parked, click Delete link next to the parked enrolment (in the Programmes List screen).
	Enrol	Click Enrol link next to the programme (in the Programmes List screen); OR Click Enrol link in the Programme Details screen.
	Park	Click Park button on any of the Enrolment screens: Personal Details Statistical Information Placement Details Learning Plan Confirmation
	Record outcome	Click Record Outcome link next to the student (in the Programme Details) screen.
	Resume after parking	Click Select link next to the parked enrolment (in the Programmes List screen).
	Switch to different programme	If you are in the Programme Details screen and want to start enrolling students in a different programme, click the Home menu and return to the Programmes List screen.
	Withdraw	Click Withdraw link next to the student (in the Programme Details screen) If the enrolment was made in error, also send an "Enrolled In error" form to the TEC.
Log in	...	See descriptions under Logging in and Login screen .
Log out	...	Click Log out menu.
Organisation	Change	See description under Change organisation when already logged in .
Outcomes	...	See relevant entries under "Enrolment" in this quick-reference.
Park	...	See relevant entries under "Enrolment" in this quick-reference.
Password	Change	Click User Services menu, then click "Change your password".
Password	Obtain	See description under Obtaining username and password .
Placement	...	See relevant entries under "Enrolment" in this quick-reference.

TOPIC	ACTION	HOW TO DO IT
Programme	List all	Display Programmes List screen.
	View details	Display Programme Details screen.
Security	...	See entries in this quick-reference under: Challenge phrase Log in Log out Organisation Password Username
Student	...	See relevant entries under “Enrolment” in this quick-reference.
Username	Obtain	See description under Obtaining username and password .