

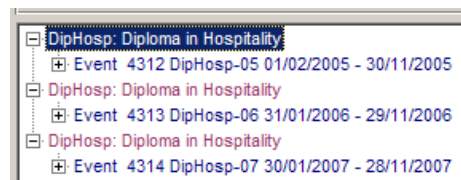
## Merging Qualification Enrolments

### Overview

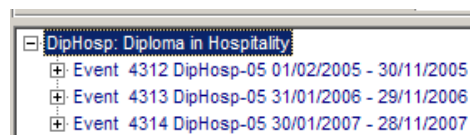
This Tip Sheet applies only to qualification enrolments that are not funded as TOPS or Youth Training. TOPS and Youth Trainees may legitimately have multiple qualification enrolments.

TEC requires you to report information that comprises a count of “qualification enrolments”. This requirement will cause some providers a problem if they have multi-year/multi-stage qualifications and have been processing enrolments in a particular way.

If you have created a new qualification enrolment and enrolment event for each year/stage – as illustrated by the screenshot below – then you have the problem.

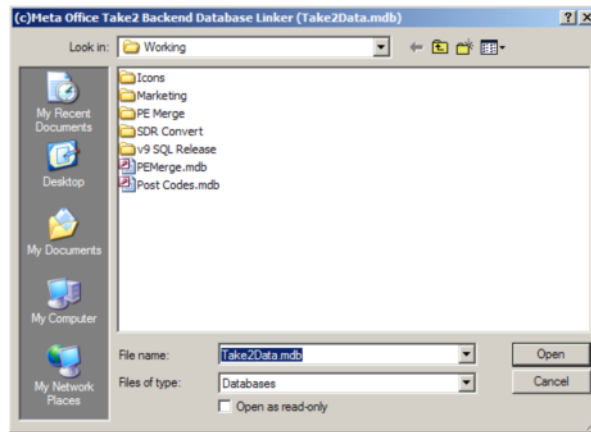


You can use the supplied Merge Utility to tidy up your enrolment records so that a student is enrolled into each qualification only once, as illustrated by this screenshot.



### Using the Utility – Access Edition

1. **Move** the file called *PEMerge.mde* to the same location as your Take2 front-end (Take2.mde).
2. **Open** the file. It should link automatically to your Take2 data file. If for some reason it does not, you will see a window like this:



Select your Take2Data.mdb file and click *Open*.

3. Next you will see a form like this:

Student	Qualification Code	Merged
▶ Ammundsen, Brett Graeme	ND0627	<input type="checkbox"/>
Andrews, Claire	ND0627	<input type="checkbox"/>
Armstrong, Lauren Susan	ND0627	<input type="checkbox"/>
Badenhorst, Justin Peter	PC9176	<input type="checkbox"/>
Baker, Jane Margaret	ND0627	<input type="checkbox"/>
Barnes, Anna Malinda	ND0627	<input type="checkbox"/>

Qual Code	Start Date	Enrol Status	Finish Studies	Complete	Completed On	Finish this year	Notes
▶ ND0627-04	14/02/2004	C		<input type="checkbox"/>		<input type="checkbox"/>	
ND0627-05	19/02/2005	C		<input type="checkbox"/>		<input type="checkbox"/>	
ND0627-06	01/01/2006	C		<input type="checkbox"/>		<input type="checkbox"/>	
ND0627-07	17/02/2007	R	30/11/2007	<input checked="" type="checkbox"/>	30/11/2007	<input checked="" type="checkbox"/>	With Merit

Select Values to Retain:

Qual Code	Start Date	Enrol Status	Finish Studies	Complete	Completed On	Finish this year	Notes	Funding Src
ND0627-04	14/02/2004	C		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		01

The top section of the form lists only students who have multiple qualification enrolments in the same qualification. The middle section of the form lists each qualification enrolment for the selected student. In the screenshot you can see that Brett Graeme Ammundsen has four qualification enrolments in the qualification ND0627.

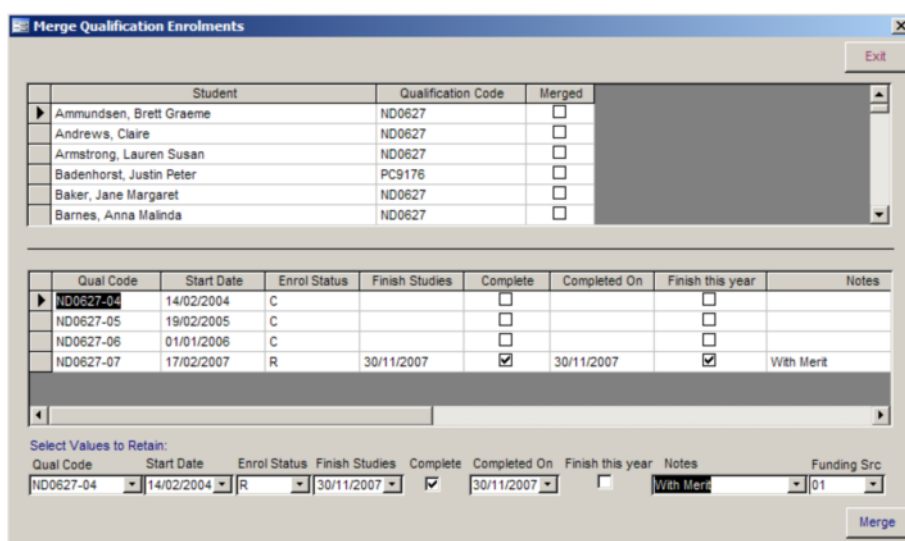
The bottom section of the form shows the key fields stored in a qualification enrolment record. You are able to pick which qualification enrolment to retain, and also what value you want to keep in the retained record.

Click the drop down arrow next to each field to display a list of the available values, and then click which entry you want saved to the merged qualification enrolment as appropriate.

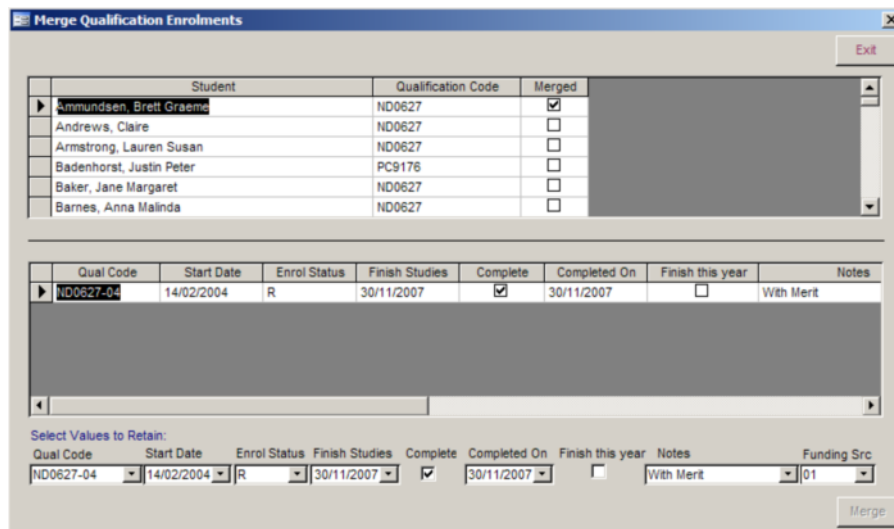
4. Normally you will retain the earliest qualification enrolment record code and values. However, if the student has withdrawn from or completed the

qualification, you will need to select some of the other values from the last qualification enrolment record.

- a. *Qual. Code* – this is the offered qualification code. Normally you will retain the code from the first enrolment.
- b. *Start Date* – this is the date of the student’s first enrolment. Always keep the earliest start date.
- c. *Enrol Status* – if the student has withdrawn retain the status “W”, otherwise retain the status from the last qualification enrolment record.
- d. *Complete* and *Completed On* – only fill these fields if the student has completed the qualification by using the values from the last qualification enrolment record.
- e. *Finish this year* – if the student has multiple qualification enrolment records and those records span more than one year, then untick this field.
- f. *Notes* – normally you will retain the value from the last qualification enrolment record.
- g. *Funding Source* – the utility only functions for funding source code “01”, “02” and “03”. It would be unusual (but not impossible) for a student to have one or more qualification enrolments for each code. In any case, retain the code from last qualification enrolment record.



5. Click *Merge* and you will see that only one qualification enrolment record remains. Also the student’s record is ticked as “merged”.



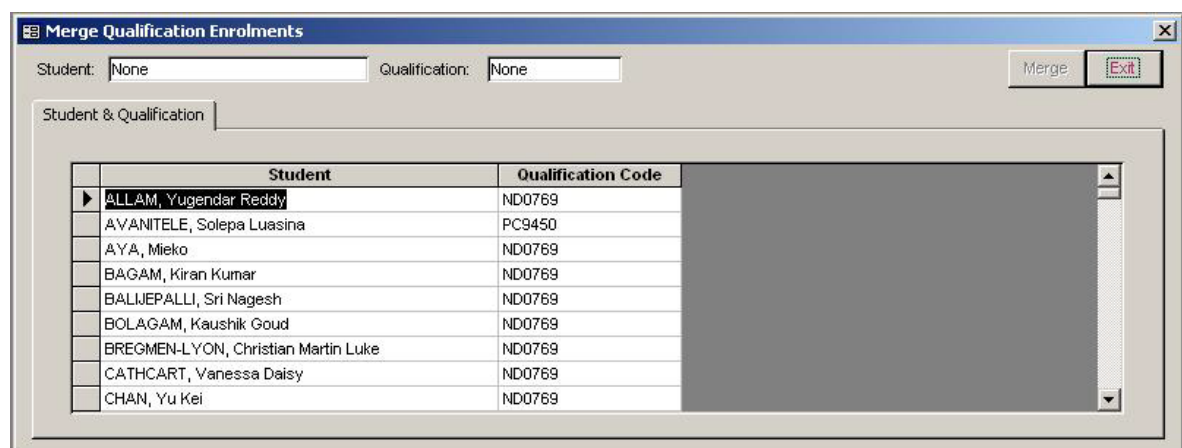
Note – If you have recorded Graduate Outcome data for the student’s qualification enrolments, only the data for the retained qualification enrolment is kept.

### Using the Utility – SQL Server Edition

Note if for a single student there are three or more qualification enrolments, it is necessary to merge two, then remerge the resultant merged QE, with the remaining unmerged one.

Get you IT person to install the utility and connect it to your Take2 database.

When opened, the utility will detect students with more than one qualification enrolments for any prescribed qualification, and display these students in a table:



Clicking on any row will select that row, and cause all qualification enrolments existing for that student / qualification to be displayed in a new table:

Student:  Qualification:

Student & Qualification | Enrolments to merge

Merge	Qual Code	Start Date	Enrol Status	Finish Studies	Complete	Completed On	Finish this year	Notes
<input type="checkbox"/>	ND0769-YR1	15/04/2002	C	17/12/2004	<input checked="" type="checkbox"/>	17/12/2004	<input type="checkbox"/>	Pass
<input type="checkbox"/>	ND0769-YR2	15/04/2002	C		<input type="checkbox"/>		<input type="checkbox"/>	ORPHAN A

The only item that can be changed in this table is the first column, *Merge*. Tick this to select the respective row for merging. When two rows have been ticked, the utility will pause for a moment, then display two additional tabs, *Values to Retain* and *Attendance*.

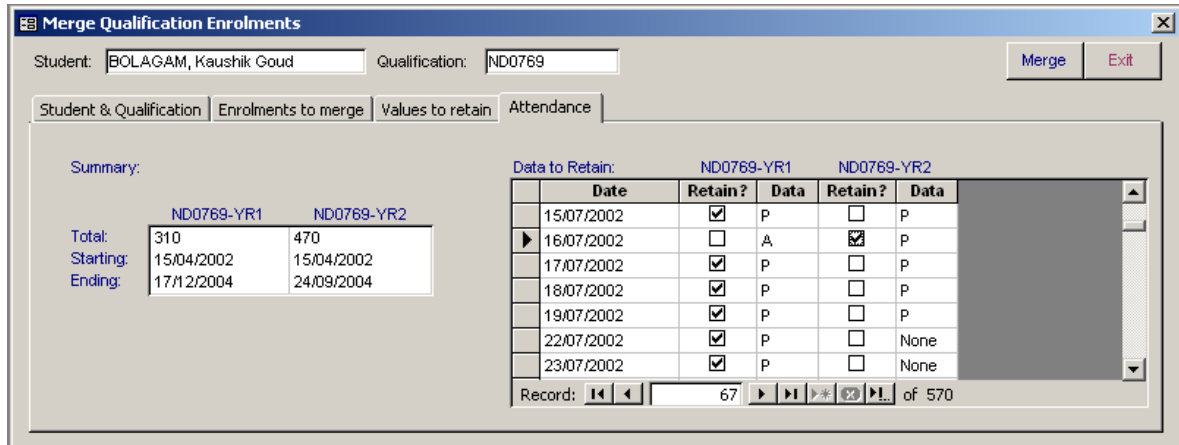
The *Values to Retain* tab allows you to select the value for each qualification enrolment column, to retain on the merged qualification enrolment row. The values you can select are limited to the values which already exist in the two qualification enrolments currently being merged. If for any column, both rows being merged have the same value, that item will be set to this value and will not be editable:

Student:  Qualification:

Student & Qualification | Enrolments to merge | Values to retain | Attendance

Qual Code	Start Date	Enrol Status	Finish Studies	Complete	Completed On	Finish this year	Notes	Funding Src
<input type="text" value="ND0769-YR1"/>	<input type="text" value="15/04/2002"/>	<input type="text" value="C"/>	<input type="text" value=""/>	<input checked="" type="checkbox"/>	<input type="text" value=""/>	<input type="checkbox"/>	<input type="text" value="Pass"/>	<input type="text" value=""/>
<input type="text" value="ND0769-YR1"/>	<input type="text" value="MoE Code: 0"/>	<input type="text" value=""/>	<input type="text" value="Provider:"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>
<input type="text" value="ND0769-YR2"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

The fourth and final tab, *Attendance*, displays only if you have the Attendance Module installed. It shows the various attendance records existing for this student for each of the qualification enrolments being merged.



The summary on the left, shows for the offered qualifications of each of the QEs being merged:

- (a) Total     The number of attendance records existing for this student / offered qualification.
- (b) Starting   The earliest date from attendance records.
- (c) Ending     The latest date from attendance records.

*Data to Retain* shows all attendance data existing for the offered qualification from the qualification enrolments being merged, by date. Where a data column shows 'None', that offered qualification has no attendance row for this date.

Retention is default-assigned on the basis of the columns values, as follows. If the second column's value is:

'None'	retain the first column's data
'N'	retain the first column's value unless the first column is 'None', in which case retain the second column
'P'	retain the first column if it is neither 'None' nor 'N' otherwise retain the second column
'A' or a decimal value	retain the first column if it is also 'A' or a decimal value, otherwise retain the second column.

If both the qualification enrolments being merged have the same offered qualification, only one set of attendance data will display, because in Take2 attendance data is stored for each different student + offered qualification combination – since both qualification enrolments have the same offered qualification they also have the same attendance data already. A single set of attendance data cannot be edited.

Where two sets of attendance data are displayed, only the *Retain?* tick boxes can be changed; Changing either one automatically causes the other to be reversed also. It is not possible to change either *Retain?* Tick box for any row where either column

has no data (i.e. for either column *None* is displayed), because you cannot choose to retain 'no record' over any existing record.

When the *Values to Retain* and *Attendance* (if applicable) data have both been set as desired, clicking the **Merge** button will effect the merging of the selected qualification enrolments. All enrolment event and assessment of graduate outcome data existing for either of the pre-merge qualification enrolments are reassigned to the post-merge qualification enrolment. Attendance data selected to be retained is assigned to the qualification enrolment retained. Attendance records which were not selected to be retained are removed from the database.

When merge processing completes, you are returned to the first tab of the form.