

SMART-TMS

ITO Trainee Management System

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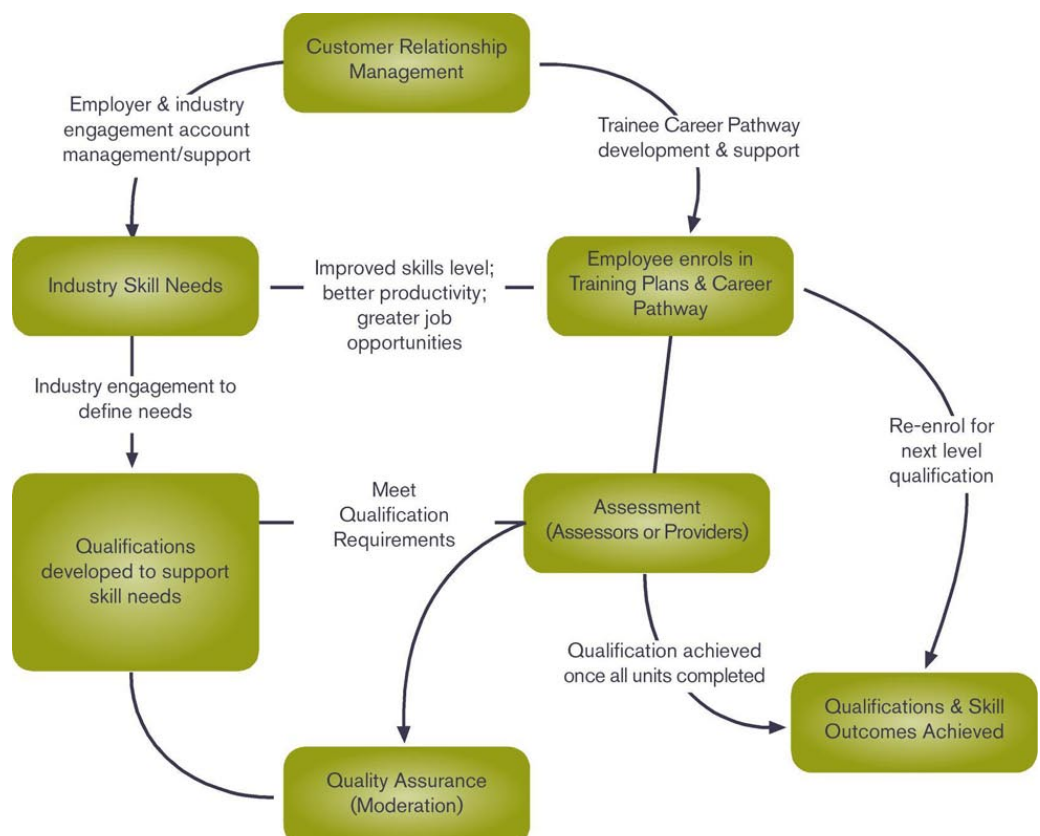
Overview of SMART-TMS

SMART-TMS is designed to reduce administration overhead and provide valuable operational and performance insight to an ITO, allowing teams to concentrate on areas that will drive the success of each Trainee and the achievement of their qualifications.

SMART-TMS (Powered by Pivotal CRM 6) has ready to implement features and modules to support each business function of an ITO. The design philosophy of SMART-TMS is to provide the user with information when they need it, whilst keeping everything simple and intuitive to use.

The use of the role based workspaces, live interactive dashboards and context sensitive task pads, mean that all information is only one-click away.

- > Improve completion rates
- > Increase re-enrolment for further skill development
- > Gain operational insight into trainee performance
- > Engage with industry and trainees



SMART-TMS Base Modules

Qualification Framework Management with integration to NZQA

SMART-TMS provides a powerful and extensive set of tools to manage the vast array of NZQA Framework requirements including: Qualifications, Unit Standards, Domains, Subfields and Fields. Designed specifically for the National Qualifications Framework ITOs can design any Qualification, transition rules, progress calculation rules, link associated documents and tasks associated with qualification development and review.

Integration with NZQA for Record of Learning exchange (export/import); NZQA Number Applications, Qualification Completions and Framework updates are included.

Training Agreement and STMs

SMART-TMS supports the management of Training Agreement with the ITO, Employer and Trainee and allows for a number of automated workflows to be configured as part of the Training Agreement entry, termination or completion process.

All documents, emails and tasks associated with the contact can be linked to the relevant training agreement through Microsoft Outlook ensuring a 360 view of all activity from one place.

All TEC STMs are automatically calculated and managed based on the Trainee numbers within the system.

Assessor, Provider Management

SMART-TMS allows each ITO to define the types of Assessors, and Providers within the system and associate these with other Organisations and Individuals as required. Scopes can be attached to each Assessor/Provider along with any exclusions to ensure there is adequate validation when processing assessments.

Moderation Management

To ensure ITOs can maintain the appropriate quality standards for assessment, SMART-TMS allows sample assessment extracts to be tagged and a defined moderation workflow applied. The workflow is configured by the ITO to accommodate the differences in approach between industries/sectors if needed. The outcomes of the moderation results are recorded against the Assessor/Provider records and can automatically alter the status should non-compliance become an issue.

What is SMART-TMS?

SMART-TMS is built on the latest CDC Pivotal 6 CRM platform, offering benefits of a flexible, configurable and scalable CRM and TMS environment; with a best of breed functionality for all facets of an Industry Training Organisation.

The design of SMART-TMS leverages our 14 years of experience working within the Education Sector (ITOs, Universities and PTEs) and their various related initiatives and projects, to provide configurable, quick to deploy, low risk tools to adapt to fast changing environments.

The following benefits are delivered as part of SMART-TMS:

- Fixed Cost, out-of-the-box ITO solution, minimising risk of custom bespoke development projects with uncertain timeframes, outcomes and deliverables
- Fixed ongoing support, enhancement and maintenance costs with available helpdesk and support services included
- Ability to influence product roadmap along with other industry groups
- Full integration with Microsoft Outlook and Document management systems
- 14 years of ITO industry experience offered by Fusion5 consultants



All correspondence, e-mails, tasks and documents associated with the moderation are recorded against the Assessor/Provider for future reference.

Trainee Progress Management

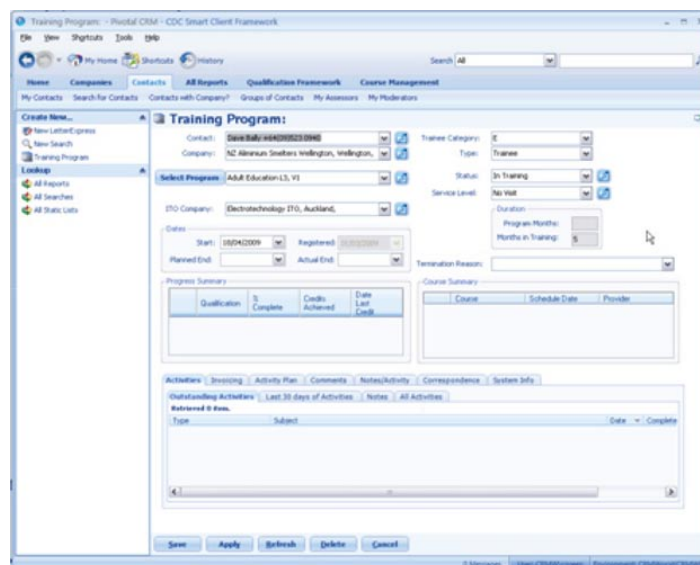
SMART-TMS automatically calculates and displays the progress of a Trainee based on their qualifications in real-time, ensuring that all assessments are accounted for. Detailed Progress Reports provide a graphical and detailed view of achievement, whilst the automated progress alerts allow ITOs to trigger specific workflow in the event of lack of achievement in a period or completion of a qualification.

Progress information can also be analysed using the SMART-TMS Business Intelligence (BI) module to track learning trends by employer, industry, sector, region, gender, ethnicity and a number of other dimensions – providing valuable insight into potential roadblocks to Trainees achieving their qualifications as well as STM and Credit Achievement Performance.

SMART-TMS supports the ability for a Trainee to have multiple concurrent employers (particularly of interest with volunteers or part time employees) without the need of duplicating information.

Record of Learning (Units and Qualification) Management

A Trainee's Record of Learning (ROL) includes both ITO entered assessments(workplace), along with imported assessments from NZQA or Providers. Unit Standards that require pre-requisites are automatically held until the pre-requisite is completed. Batch assessments from employers can also be uploaded into SMART-TMS to save on data entry time via a spreadsheet.





All assessments are validated to ensure unit standards are within the scope of the assessor/provider, have the necessary accreditation from the ITO and form part of the Qualification.

TEC Quarterly Return & ITR Integration

SMART-TMS enables you to meet all TEC reporting requirements. Integrations are being continuously maintained to comply with the current and future requirements, including the provision for the Industry Training Register (ITR).

Account Management and Activity Management

SMART-TMS provides you with the tools to define and manage your employers, trainees, providers, assessors and stakeholders etc... Any number of staff members can be associated with account management responsibility for an organisation or individual with user-definable roles. All activities including e-mails, tasks, calls, meetings and notes can be linked to one or many organisations or individuals through Microsoft Outlook.

Microsoft Outlook Integration

SMART-TMS takes advantage of Outlook's familiar user interface to allow users to create, modify and view e-mails, meetings and tasks. In essence, Outlook becomes part of SMART-TMS.

Customer Relationship Management (CRM)

The CRM features of SMART-TMS allow all Organisation and Individual information to be stored in a single place, along with classifying them for account management, marketing and communication purposes.

The use of 'snapshots' when viewing an Organisation or Individual's record provides an instant summary of all information relevant to the relationship the ITO has with that record; avoiding the need to drill down into specific areas to gain an overview.

To support ITO Client Managers to increase numbers in training and grow the number of active employers, Prospect and Opportunity management features assist with tools to manage these, from initial contact or interest through to engaging in industry training.

Document Management

Using Microsoft SharePoint services, SMART-TMS provides a document management system integrated to key areas of the application.

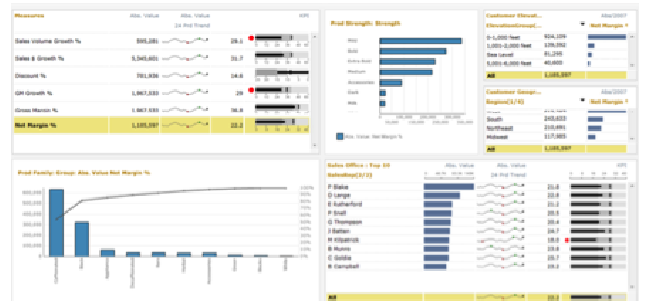
Documents can be accessed by opening record such as a Qualification, Organisation or Individual, and viewing the list of documents appropriate to that record. Users may also upload new documents, which are automatically filled in SharePoint.

Optional Modules

Business Intelligence reporting Module

The success of your organization depends on timely actions based on insights buried deep within trainee performance information.

The big question is how to access that information easily and make it readily available to all the decision makers. SMART-TMS BI module provides real-time dashboards that allow users to slice and dice information on the fly without the need to customise reports.



Course Scheduling, Registration, Tracking Module

A course could be one-off, or repeated many times with complex schedules, regions and providers. The course module allows ITO to setup and manage both simple/complex courses contracted to external providers, along with automating course allocations based on pre-defined criteria.

A trainee may be required to attend a set of courses, perhaps with specific units attached or have minimum achievement criteria before automatically be rolled-up into the next course. The Course module also assists with capacity planning and scheduling across regions.

Financial and Subsidy automation Module

Whilst SMART-TMS is not a Financial system, the comprehensive Financial and Subsidy module allows ITOs to automatically configure invoicing and subsidy rules which can allow invoices or subsidy requisitions to be automatically generated.

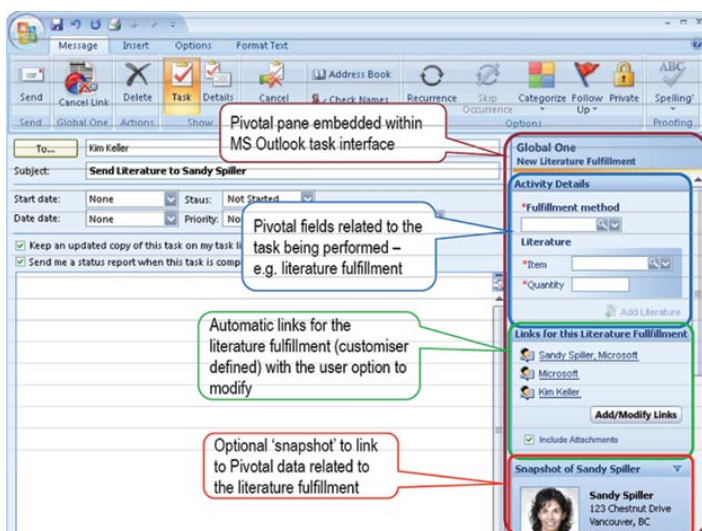
This capability can be applied to the invoicing of Training Agreements, NZQA Application Numbers and Course registrations; as well as calculate subsidy eligibility based on the pre-defined criteria. All above transactions, are then exported to the financial system.

Self-Service Portals (Employer, Assessor, Trainee and Provider)

SMART-TMS Self-Service modules allows ITOs to provide on-line web portal functionality to specific audiences as well as offer self-service features without the risk of complex website integration or development.

SMART-TMS Self-Service modules offer customers:

- Access to reports such as Record of Learning, Progress Reports, Credit Achievement reports
- Ability for Assessors to enter assessments online
- Ability for Employers to manage training agreements online
- Personalized Portal and Message Center
- Press Releases, Events, FAQs



Modules





SMART-TMS Base System

 CRM	 Training Agreements	 Assessor / Providers	 The Evidence Moderation	 Document management	 Learning Material
 Progress Management	 Record of Achievement	 NZQA Framework Management	 Account Management	 Event and campaigns	 E-mail phone, tasks, calendar

Enabling Modules

 Course Management	 Invoice / Subsidy	 BI Reporting
 Financial Management		

Online Portal Modules

 Assessor Web Portal	 Employer Web Portal
 Provider Web Portal	 Employee Web Portal

About Fusion5

Fusion5 is a New Zealand based organisation specialising in the provision of high quality Customer Relationship Management (CRM), Enterprise Resource Planning (ERP) and Human Resource Management (HRMS) solutions. Our key strength is the provision of experienced project management, application and technical consulting and full implementation services.

Fusion5 fills the gap between the traditional 'Big 5' consulting firms and the vendors. It recognises that organisations want experienced professionals with a team approach to delivery, responsiveness and flexibility, and a high degree

of commitment to a lasting relationship. As a result, Fusion5 has found a niche and enjoyed rapid growth.

Fusion5 has more than ninety consultants across New Zealand and Australia. Fusion5 consultants have worked across every major industry providing business and technical advice to management and end users at customer sites including Competenz, Forrest Industries Training, Watercare Services, AMP Capital, Tourism Industry Association NZ (TIANZ), Mainzeal Construction, Aarque Graphics, Surf Life Saving New Zealand, KROHNE and many others.

The Fusion5 Difference

- We focus on customers first – everything we do is geared to ensuring we deliver for our customers.
- We look to provide solutions as opposed to product.
- We look to add value around business process improvement and solution optimisation.
- Long term support is a core part of our business.
- We understand the value and importance of service – our culture is built around this.

- We are very open to partnerships – with you and your existing suppliers / partners.

For further information please visit our website www.smart-tms.com