

Extending and tailoring your LMS

How we use smart low budget customised solutions
to meet our needs

Facilitator:

Ange Robinson

Session Summary

- Family Planning, a charitable organisation, presented their Totara Partner, Catalyst IT, with a whole new challenge when they submitted their specifications to them for what an LMS/Totara needed to do for their organisation
- Initially the specifications didn't include functionality around invoicing and payments, so Catalyst came to the rescue with a customised solution, tailored to their client's needs
- This session will demonstrate to learning & development professionals and management how an LMS can be tailored to your needs on a low budget.

Session Outcomes

In this session you will learn how:

- A tailored invoicing and payments solution was developed to meet specific and unusual requirements
- A course wait list solution was created that put control in the hands of the administrators
- A new solution integrates with the organisation's accounting system and helps to manage bottlenecks
- Family Planning is taking their invoicing and payments solution to the next stage.



Family Planning New Zealand

Family Planning works to promote a positive view of sexuality and to enable people to make informed choices about their sexual and reproductive health and well-being.

familyplanning.org.nz

Family Planning New Zealand

Family Planning was founded in 1936 to support women to decide on the number and spacing of their children.

Contraception

STIs

Cervical Screening

HPV Vaccinations

Health Promotion - education



familyplanning.org.nz

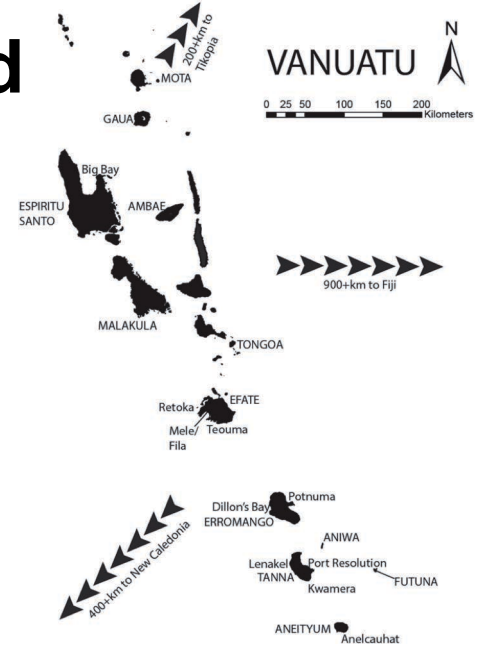
Family Planning New Zealand

Family Planning International Programmes works for sexual and reproductive rights for all.

Projects and advocacy

Education

Current locations - Kirbati, Niue, Vanuatu



familyplanning.org.nz

Professional Training and Development

- **Training and professional development for Drs, Nurses, Midwives, other clinicians**
- Cervical Screening
- Contraception
- Contraceptive Updates
- STIs
- Emergency Contraception
- Standing Orders
- Post Partum Contraception

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Who uses Totara?

- Internally approx. 20 currently, with an impending rollout organisation wide for internal training
- Externally, all learners who access Family Planning's suite of clinical and health promotion training

Change from previous system to Totara

- Family Planning previously used a system that worked for delivery of courses in a workshop format
- We needed a Learning Management System that would enable us to develop courses in an online learning format to fit with the changing needs of our current and future learners

Help! Invoicing needs to be streamlined!

Learners can pay via DPS for immediate access to courses

BUT

A lot of our learners have their training paid for by their clinic practice or DHB therefore the ability to invoice is a **MUST!**

AND

We needed the solution to be simple and fit in with existing Admin and Finance processes

What happened next?

Family Planning and Catalyst met to discuss

- How invoicing and payments should flow
- The ideal payment set up
- How session and learner details flow through enrolment to payment



catalyst

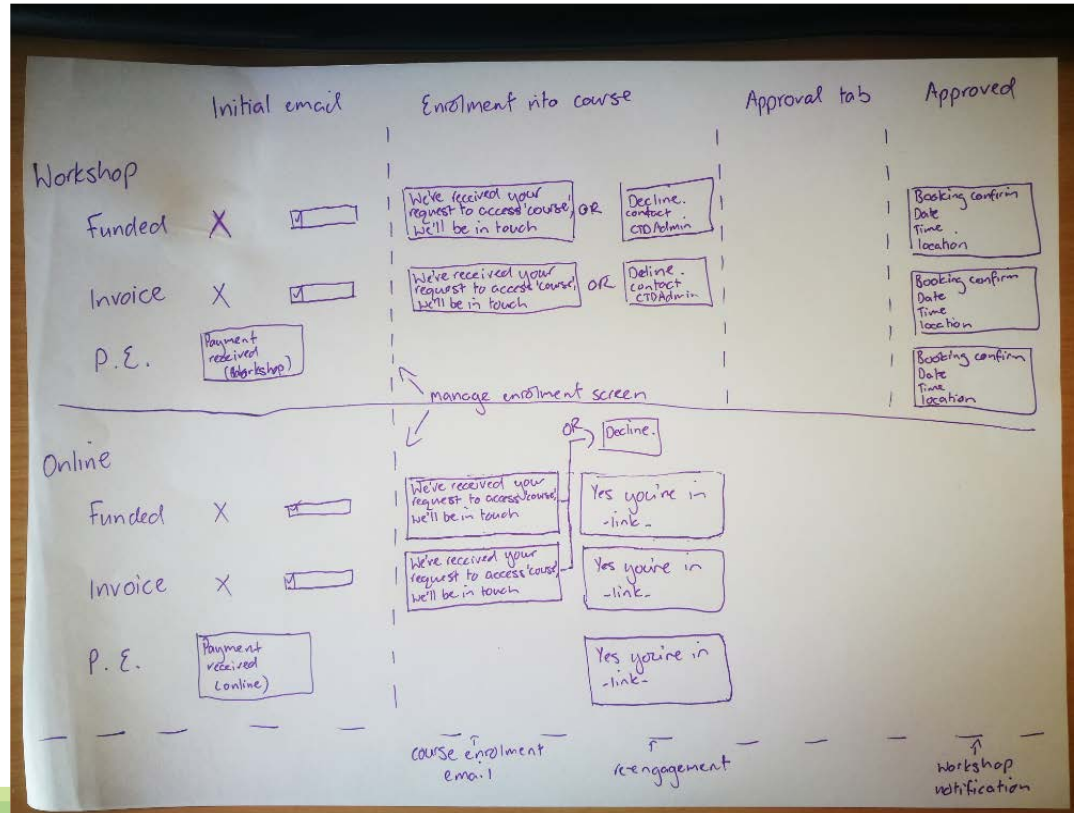
Catalyst to the rescue!



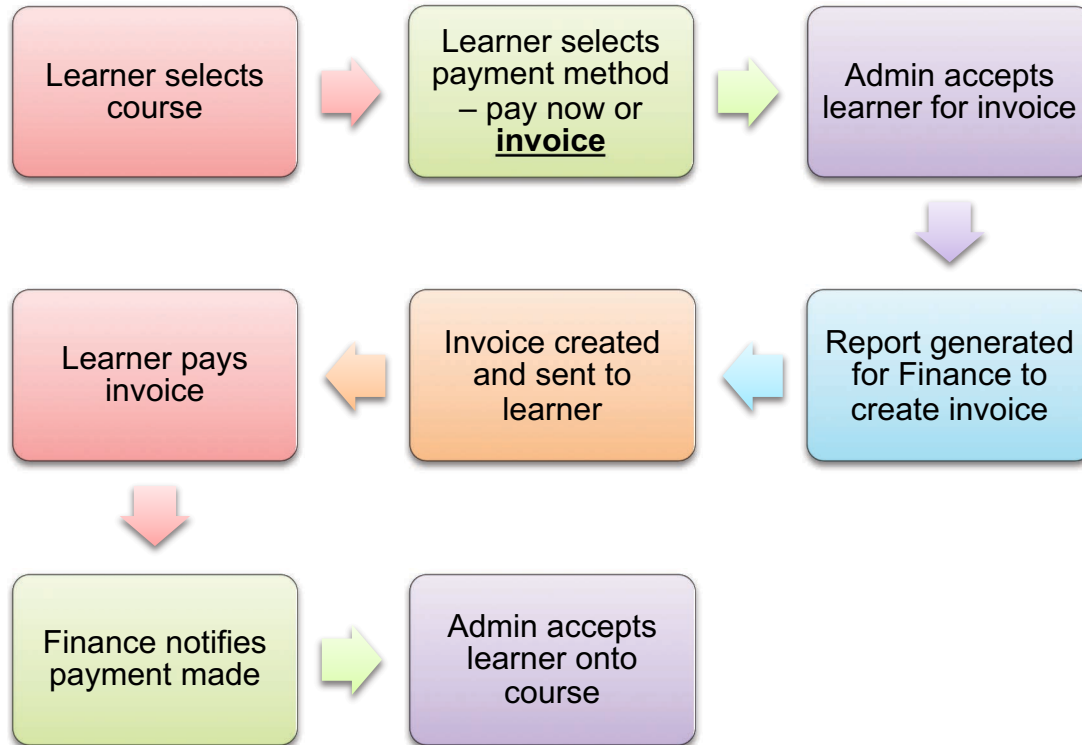
Catalyst's solution

- Upgrade and install the Payment Express plugin, replacing the PayPal plugin
- Add filters to the enrolment confirmation screen
- Create a new invoice report source
- Add an access method field to the Workshop Attendees screen (eg Payment Express, Invoice, Funded)
- Create a new wait-listing solution

Make it do this!



Catalyst's solution



Create a new wait-listing solution

FAMILY PLANNING CERTIFICATE IN CONTRACEPTION AND SEXUAL HEALTH

Show dates for

Sep 9

Mon, Sep 9, 9:00 AM -
Thu, Sep 12, 5:00 PM

Wellington

Presenters:
Stacey Ross

\$1320 incl. GST

Sold out! Register
your interest

[JOIN WAITLIST](#)

Oct 1

Tue, Oct 1, 9:00 AM - Fri,
Oct 4, 5:00 PM

Christchurch

Presenters:
Kate Bridgman-Smith

\$1320 incl. GST

[REGISTER](#)

Oct 21

Mon, Oct 21, 9:00 AM -
Thu, Oct 24, 5:00 PM

Auckland

Presenters:
Stacey Ross

\$1320 incl. GST

[REGISTER](#)

Add an access method field to the Workshop Attendees screen (eg Payment Express, Invoice, Funded)

ADMINISTRATION

Workshop administration

- [Edit settings](#)
- [Locally assigned roles](#)
- [Permissions](#)
- [Check permissions](#)
- [Filters](#)
- [Logs](#)
- [Backup](#)
- [Restore](#)
- [Notifications](#)

Course administration

Site administration

Search in settings

GO

SIGN-UP FOR FAMILY PLANNING CERTIFICATE IN CONTRACEPTION AND SEXUAL HEALTH WORKSHOP

Location

Christchurch

Event date/time

1 October 2019 - 4 October 2019, 9:00 AM - 5:00 PM

Duration

3 days 8 hours

Room

Christchurch
(Room details)

Maximum bookings

14

Approval required by:

Facilitator

Facilitator

Kate Bridgman-Smith

Cost (includes GST)

1320

Details

The venue is 9 Washington Way, near the intersection of Moorhouse Ave and Gasson Street. There is no parking on-site. The training room is on the first floor but there is no lift access. There are a number of food outlets within a few minutes' walk.

There are required fields in this form marked *.

Payment Status

Choose...

Waitlist

Requests for session organiser

Non-attendance reason

Receive confirmation by * 

Email with iCalendar appointment

Create a new wait-listing solution

ADMINISTRATION

- Course administration
 - Edit settings
 - Turn editing on
 - Course completion
 - Completions archive
 - Completion editor
- Reminders
 - Users
- Filters
 - Reports
- Grades
 - Gradebook setup
- Backup
- Restore
- Import
- Publish
- Reset
 - Question bank
 - Switch role to...

Site administration

LEARNER WAITLISTS 2019

Cervical Screening Course Waitlist

Date	Time	Room	Capacity	Status	Options
Wait-listed	Wait-listed		0 / 10 (1 Wait-listed)	Booking open	    Attendees Join waitlist





[View all events](#)

EC Course (f2f) Waitlist

Date	Time	Room	Capacity	Status	Options
Wait-listed	Wait-listed		0 / 10 (0 Wait-listed)	Booking open	    Attendees Join waitlist

[View all events](#)

FP Certificate Course Waitlist

Date	Time	Room	Capacity	Status	Options
Wait-listed	Wait-listed		0 / 10 (28 Wait-listed)	Booking full	    Attendees Join waitlist

Create a new invoice report source



ADMIN - INVOICE REQUESTS: 368 RECORDS SHOWN

Search by

Fullname ⓘ

contains

Session Start ⓘ

- is after 
- is before 
- is between start of today and days before today (date of report generation)
- is between start of today and days after today (date of report generation)

User's Email ⓘ

contains

Paid ⓘ

any value

Sent ⓘ

any value

External reference # ⓘ

contains

Reference # ⓘ

contains

Application Comment ⓘ

contains

Course Shortname ⓘ

contains

SEARCH

CLEAR

Invoice

Tax Invoice
GST # 13-850-925

RD2
Pukekohe,
Auckland



National Office
Level 6
203 - 209 Willis Street
PO Box 11-515
WELLINGTON

T: (04) 384 4349
F: (04) 382 8356
familyplanning.org.nz

Charitas # CC11104

Page: 1
Date: 31/07/2019

Invoice No	Customer Code	Order Reference	Purchase Order
IN18357	KER10CTD	2465-22-8	

Description/Comments	Amount
Introduction to Contraception 30 Sep 2019 at 09:00 Auckland	250.00
GST Component	32.61
Amount due	250.00

Please deposit to the following

Bank a/c 060501 0473033 00 ANZ Bank, Willis Street, Wellington Branch

Please quote your invoice number, customer code and order reference when paying by direct credit

Payment Terms are 7 days following the date of invoice

If paying by cheque, please return this portion with your remittance to:

Family Planning
PO BOX 11-515
Wellington

Customer No. KER10CTD
Tax Invoice No. IN18357
Amount Paid 250.00

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Create a new wait-listing solution

Location

Auckland

Event date/time

12 August 2019, 9:00 AM - 4:00 PM

Duration

7 hours

Room

Auckland

Newpark Centre (Level 2)

(Room details)

Maximum bookings

12

Approval required by:

Facilitator

Facilitator

Stacey Ross

Cost (includes GST)

275

Details

The venue is 5 Short Street Newmarket. There is no parking on-site. There are several parking buildings within 100-200 metres. Cafes and food outlets are nearby.

ATTENDEES	WAIT LIST	CANCELLATIONS	TAKE ATTENDANCE	APPROVAL REQUIRED	MESSAGE USERS
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Name	Time Requested	Enrol instance names	Attendee's note	Decide Later	Decline	Approve
[REDACTED]	29 July 2019, 8:20 AM	apply	awaiting payment 	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
[REDACTED]	31 July 2019, 11:29 AM	apply	awaiting payment 	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

UPDATE REQUESTS

Go back

Control is in the hands of the Administrators

Maximum bookings

12

Approval required by:

Facilitator

Facilitator

Stacey Ross

Cost (includes GST)

275

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ATTENDEES	WAIT LIST	CANCELLATIONS	TAKE ATTENDANCE	APPROVAL REQUIRED	MESSAGE USERS
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ATTENDEES

Actions

Name	Time of sign-up	Status	Non-attendance reason	Payment Status	Waitlist	Requests for session organiser
[REDACTED]	29 Jul 2019 at 09:14	Booked		⚙️ Paid	No	
[REDACTED]	24 May 2019 at 09:37	Booked		⚙️ Paid	No	
[REDACTED]	27 May 2019 at 14:02	Booked		⚙️ Funded	No	
[REDACTED]	4 Jun 2019 at 14:52	Booked		⚙️ Funded	No	
[REDACTED]	17 Jun 2019 at 14:35	Booked		⚙️ Funded	No	
[REDACTED]	1 Jul 2019 at 11:08	Booked		⚙️ Funded	No	
[REDACTED]	12 Jul 2019 at 12:49	Booked		⚙️ Paid	No	
[REDACTED]	8 Jul 2019 at 15:28	Booked		⚙️ Funded	No	
[REDACTED]	2 Aug 2019 at 15:59	Booked		⚙️ Funded	No	

Export as

CSV

EXPORT

Future Proofing



- A fully integrated invoicing solution that will enable invoices to be generated to learners when applying for some courses
- Leaves the control in the Admin staffs hands
- Removes the manual processing between Admin, Finance, and the Learner