

Collection tool user guide

Introduction

The functionality in the collection tool for UCAS Undergraduate and UCAS Conservatoires users was launched in January 2017. This document has been designed to help you find out more about the product and how it works.

The collection tool currently holds all UCAS Postgraduate courses, and all full-time courses currently included in UCAS Undergraduate and UCAS Conservatoires.

Registration and sign in

UCAS is moving towards a single sign on across all of our products and services. The search and collection tools are the first products in this process to be connected to a single user account.

You will need to register for the collection tool. If you have previously registered an account for the postgraduate search tool or collection tool, then you can use the same credentials. If you've forgotten your password, click the '**Forgotten password?**' link.

If you haven't registered in our live environment before, you need to do so first. This is different from your sign in details for the beta collection tool. To register, follow the steps below.

- Click **Register**.
- Enter your name and select **Next**.
- Enter your email address and select **Next**.
- Create a password and select **Next**.
- Pick a security question, supply an answer, and select **Next**.
- Read and agree to the terms and conditions and privacy policy, and select **Register**.
- You will receive an email containing a link to activate your account.
- Once you've received the email, click the **Activate account** link to complete your registration.

Passwords

Account passwords need to be secure and contain between eight – 30 characters, upper and lower case letters, at least one number, and one special character, such as a '\$' or '!'.

If you forget your password, you can reset your account by using the **Forgotten password** link on the sign in page. UCAS staff are not able to reset account passwords.

What should I do if I haven't received the activation email?

Check your spam, clutter or junk folder, as the emails should appear within a couple of minutes of registration being completed.

If you try to register and then receive an error message, this is likely to be because you already have an account associated with that email address. You should sign in, and if you have forgotten your password, use the Forgotten password link.

Alternatively, you can add mail-service@gigya-raas.com as a contact in your email software, and then try to register again.

If this still does not result in the activation email being received, or you see an error message, please register using a different email address.

Providing feedback

All feedback should be submitted using the feedback tab in the collection tool. Click the red 'Feedback' button at the top of any of the collection tool web pages and a form will open for you to complete. Complete the form and click the **Submit** button at the bottom. Users of the Internet Explorer browser may not be able to see the feedback form.

Please **do not** use any other means to send your feedback to us about the collection tool.

Permissions for users of the collection tool

There are three permissions that can be associated with a user account. Users who are assigned a permission will be able to fully manage the data the permission relates to.

The view you have on your dashboard is dependent on the access your user account was set up with. It could include any combination of

- **user management** – view and manage users who have access
- **course management** – view and manage your courses
- **provider management** – manage details about your provider

User management

In this section you can:

- see a list of all users
- search for a user
- add a user
- remove a user
- access and update user details (e.g. permissions)

If you add a user, you need to inform them so they can register and sign in. You can only pass on the permissions that you have. For example if you are user manager but do not have course management permissions, you cannot assign those permissions to anyone else.

Accounts assigned the user management permission can remove all other user accounts for that provider.

Provider management

In this section you can view and update provider details, which will appear in search results.

Provider details include:

- provider details and logo
- contacts
- departments
- locations
- fees
- subject options

If you wish to change provider details and/or logo, contact the Data Collection Team.

New contacts and department details can be added. However, you cannot remove the main (default) contact or department details that have associated contacts. These can only be edited.

You cannot remove any department, location or subject option that has associated courses. You can remove them once the associated courses have been reassigned.

Course management - list view

In this section, you can view a list of your courses, make updates, and add new courses. You can view:

- a list of all courses and their recruitment routes (e.g. undergraduate, or postgraduate)
- the total number of course options available at the provider

You can search for courses (using the title search at the top of the screen, or the filter tick boxes on the left of the screen).

Courses are displayed by course title, with specific option details under the red plus and minus symbols to the left of each course title. This includes the outcome qualification, publication status, location of study, duration, and study mode. Click View to see more information.

You can only action bulk update courses from this view. Some bulk update functionality will only become available through releases after the January launch e.g. fees, and entry requirements.

Course management + Add new course

Bulk actions
Please select v

Clear filters

Undergraduate courses
 All Undergraduate (33)
 UCAS Undergraduate (29)
 UCAS Conservatoires (4)

Postgraduate courses
 All Postgraduate (28)
 Direct application only (27)
 UCAS Postgraduate (1)

Archive
 Show archived

Publication status
 Published (26)
 Not published (35)

Search for course titles q

Found 61 results for Internal use provider (AMS) ↻

+	Ancient History (Research) 10 Postgraduate	View
+	Applied Anthropology and Community Arts (Taught) 3 Postgraduate	View
+	Art 2 Undergraduate	View
+	Art2 2 Undergraduate	View
	Biology (Taught) 0 Postgraduate	View
+	Brand new not real course (Research) 1 Postgraduate	View
+	Chemical Engineering (Research) 4 Postgraduate	View
+	Collection tool Studies 1 Undergraduate	View
+	Design (Research) 5 Postgraduate	View
+	Digital media 0 Undergraduate	View
+	Geographical Information Systems (Taught) 2 Postgraduate	View
+	History 9 Undergraduate	View
+	History 9 Undergraduate	View
+	Mathematics 3 Undergraduate	View
+	Mathematics 3 Undergraduate	View
+	Music 2 Undergraduate	View
+	Music 2 Undergraduate	View

Course management – course details view

Once you have clicked on the View link from the list, you can see details of the selected course, e.g. course summary, department responsible for the course, and contacts. At the bottom of the record you will see the qualification level options available for the course.

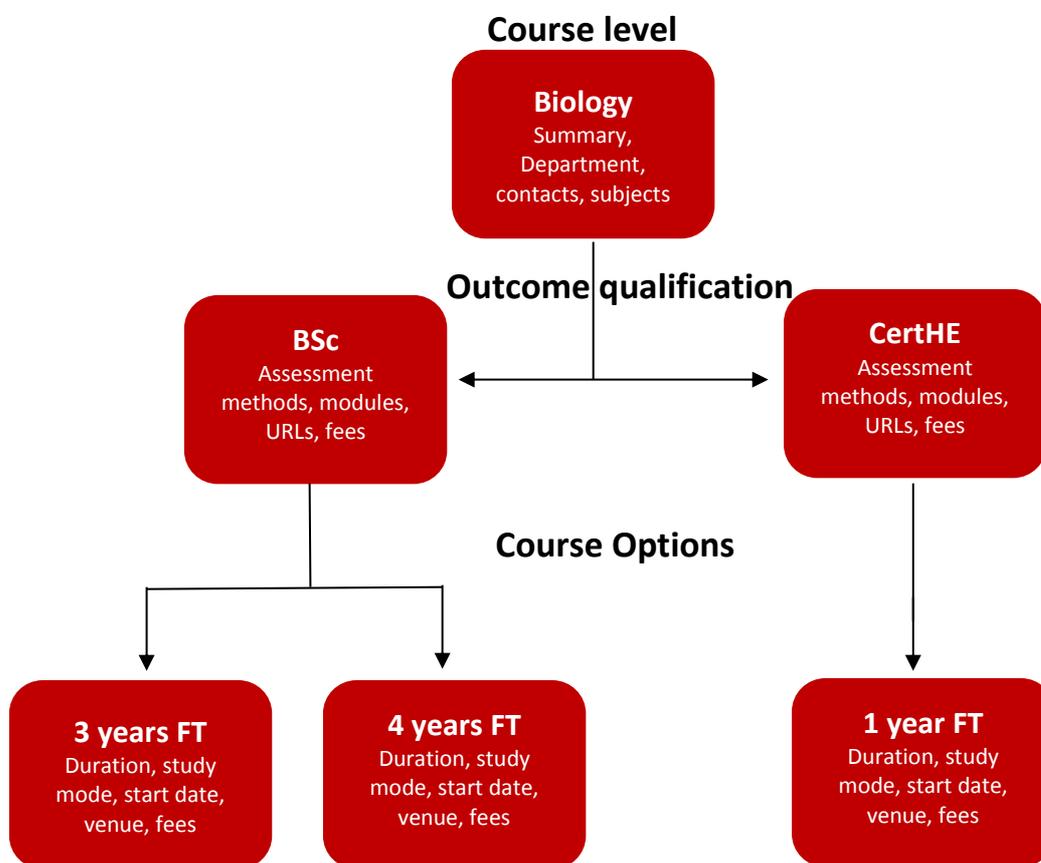
To view the details, e.g. assessment methods, modules, click the red plus symbol to the left of the qualification bar.

Course management – course options

To indicate a variation in delivery, additional course options can be added. All related variations of a course should be listed as options associated with that course record.

Individual course options will show study mode, start date, location of study, duration, fees by domicile, and the publication and application status of each option.

Additional option-specific fields, for assessment methods, modules and fees, can be used at course option level to override the default information held at qualification level.



Important information

UCAS Conservatoires specific fields (e.g. relating to specialisms, auditions) will not be available for January 2017, but will be added in a later release.

We advise providers not to update course entry requirements until the bulk management functionality is released at a later date. This will ensure no changes are lost and work is not duplicated. Entry Profiles are not being migrated.

Further information and support

Training webinars – these will run through the basic elements of how to use the collection tool, explaining the different fields and how to add users, alongside answering any questions you may have. You can register now by clicking one the link below.

[Friday 3 March, 10:00 – 11:00](#)

To help you visualise the transition to our new services, we have created a [roadmap](#), which outlines the key activities and features we will release over the coming months, as more functionality will follow after we have released the collection tool.

Key Contacts

The Data Collection Team can support you with any queries about Course Collect, the Data Collection System, and the collection tool. You can contact the Data Collection Team at coursesdata@ucas.ac.uk or on 01242 544 864.

Frequently asked questions

1. Will all data added to Course Collect for 2017 be reflected in the new collection tool?

On 25 November 2016, we took a snapshot of the course information currently in Course Collect. This has provided us with the 2018 courses dataset which we've migrated into the collection tool. Some fields such as entry requirements are not being migrated – we've created a [detailed migration summary](#) outlining the migration field by field.

New or edited courses added after this point **will not be** reflected in the collection tool, this data must be added or edited again.

2. Which courses will appear in the search tool when it's released in May?

Any courses in the collection tool with an outcome qualification and course option set to **Published** will appear in the search tool.

3. If we don't have all of the information, can those fields be left blank?

Some fields must be completed for a course to be held on the system, such as the title and other required fields at course profile level. A course cannot be published unless it contains the required information at course profile, qualification and option levels. Required fields will be highlighted in red if a user attempts to save without completing them. Changes will not be saved until these mandatory fields are entered. Mandatory information is shown with an asterix.