Provider manager manual Introduction to Search

Helping you support young people as they progress through their learning and enabling them to achieve positive outcomes.



CONTENTS

UCAS Progress works with education providers and local authorities to support young people aged 13 to 19 as they make choices about their learning pathways. UCAS Progress spans academic courses through to vocational courses and training opportunities. It is for all learners irrespective of destination.

There are two components - Search and Apply - available at www.ucasprogress.com.

Search. With Search young people can research learning opportunities irrespective of local boundaries. Search's localised start points offer searching and map views based on location and distance the learner is willing to travel.

Apply. A single online application system, Apply enables young people to apply for learning opportunities, either within or outside their current provider. Teachers and advisers have a simple and efficient means of managing applications and admissions, plus reporting to support tracking, analysis and provision planning.

This manual is part of a series of role-based manuals and guides designed to help you get the most out of using UCAS Progress.

October 2013

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1.0 Introduction to UCAS Progress Search and Apply

1.0 INTRODUCTION TO UCAS PROGRESS SEARCH

1.1 What is Search and Apply?

UCAS Progress Search and Apply provide learners with the opportunity to search for (locate) courses and then submit and manage applications online. UCAS Progress Search is an online course directory enabling learners to find courses and opportunities available to them in their area. UCAS Progress Apply enables young people to submit their applications to their chosen providers and manage their applications through to enrolment. Your local network of IAG advisers, your council representatives or your local authority promote this resource to learners.

1.2 What is a Provider Manager?

In this context a Provider Manager is a local training provider responsible for maintaining a specific institution's or number of institutions' details on the UCAS Progress system.

A Provider Manager can:

- view the provider details
- edit the provider details
- upload the provider logo
- link to the provider list of venues
- link to the provider list of contacts •
- view, edit, delete and create the provider venues
- view, edit, delete and create the provider contacts
- create learner groups.

As a local training provider you have responsibility for maintaining your own institution details and the details of your provision, ensuring they are up to date and provide learners with enough information to make informed choices.

1.3 What is the purpose of the administration area?

The administration area provides tools to manage the provision information, the details of your institution including venues and contact information. This manual will provide information on how to use the administration area and the individual functions.

1.4 How will you receive your login details?

All user accounts will be set up either by your local authority representative or by a dedicated User Manager within your provider.

Your username will be set up as your email address in the first instance and to verify your account you will receive a system generated verification email from UCAS Progress.

Within the email you will be requested to click the verification hyperlink and will be prompted to choose a password. Ensure that you choose a memorable password to allow successful repeat access to your account.

To change your username or password see section 3.

2.0 LOGGING IN AND OUT

2.1 Logging in

From the UCAS Progress homepage go to the top right-hand corner and enter your username and password. This will take you to your own individual administration site homepage.

2.2 Resetting your password

If you have forgotten your password there is a 'Forgotten password?' link beside the log in boxes.

2.3 Logging out

When you are ready to finish your session you can log off by clicking the 'Log off' button at the top right-hand corner of the screen.

3.0 MANAGING YOUR ACCOUNT

3.1 Accessing your account

Click on 'My Account' in the top right of the UCAS Progress administration homepage. On this page you can edit your personal details, username and password.

3.2 Editing personal details

In this section you can change your first name, last name, email address and telephone number. When you have finished your updates click 'Save'. Keep your personal details up to date so that we can contact you if you forget your log in details.

3.3 Editing your username

In this section you can change your username. The username must be between six and 256 characters and may contain letters, numbers or a select few characters (i.e. @.-_). You can change your username to something that is more memorable so that you don't forget it. When you have finished your updates click 'Save'.

When you change your username you will be logged out of the site. You will need to log back in with your new username to continue using the site.

3.4 Editing your password

To change your password select the 'Password' tab and enter your current password, then your new password, and then confirm that new password. Your password must be between six and 20 characters and contain at least one letter and one symbol or number. When you have finished your updates click 'Save'.







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4.0 MANAGING YOUR DASHBOARD

Your dashboard enables you to have an overview of your role and highlights areas you may want to have a look at. For example as a provider manager you can see if there is missing information for your provider e.g. logo's, venue details etc. By clicking on the red hyperlinks you will be directed to the specific areas and view what needs to be completed.

Provider manager

As a provider manager within UCAS Progress you can manage the details of your provider or providers.

Edit

View

Details

You have missing key information.

Key information about providers ensures they appear correctly within the search navigate to key sections of the information Additional into

These sections enable you to market your details effectively.

From here you are able to

provider details.

From here you are able to manage and navigate to information relating to venues, this included venues without postcodes, venues with missing address details and venues with missing additional information.

You have missing additional 1ts provider entries within the search. You have missing extended

information. Extended information gives potential applicants descriptive details about you

View You do not have a logo.

Venues

You have venues with no View postcodes. Venues with no postcodes will not appear within the search.

View You have venues with missing address details.

You have venues with View missing additional information.

Additional information gives potential applicants venue contact details.

From here the system highlights that there is no logo.

5.0 MANAGING YOUR PROVIDER DETAILS

5.1 Editing your provider details. To edit the information currently listed about your provider follow the steps below:-

- a. Select the 'Providers' tab on your administration homepage.
- b. You will then be provided with a list of providers that you are able to view and edit. This list is based on the permissions you have been allocated.
- c. Select the provider that you wish to edit and click the red highlighted link displaying the provider name. This will open a page with pre-populated details about the provider

You are able to add or change the following details:

Key fields

* denotes a mandatory field

Name *: Name of your provider.

UKPRN *: UK Provider Reference Number. is required and must be a number between and 999999999. This can be found at the Uk Learning Providers website www.ukrlp.co.u

Provider type*: Your provider can be catego multiple provider types. Choose from the list School sixth form, Special school, Other, A school, Training provider, Independent scho form college.

Area*: National, regional, sub-regional, loca Select the area level and then enter the nan using the text box.

Visible: This allows you to make your provider visible in real-time at the click of a button. If you do not make your provider visible, learners will not be able to see the provider's details.



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Additional information

Ofsted: Enter your provider's Unique Reference Number (URN) to allow learners to link through to your latest inspection reports. The URN can be found at the Ofsted website www.ofsted.gov.uk/inspection-reports/ find-inspection-report.

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Website: This is a link to the provider website and will appear in the key information of the provider details on each course.

Email address: This is an email link for either the admissions office or a designated member of staff to receive information sent to your provider.

YouTube video ID: Enter the unique ID for a YouTube video. You can find the ID in the URL. (For information on how to add a YouTube video ID see section 5.7).

Extended information

Welcome: This section of the page can be used to give an overview of your provider and may be a general statement, perhaps from the headteacher, college principal or head of sixth form.

About us: This section can be used to provide learners with information about your provider, which may help them make a decision about applying for courses at your provider.

Facilities available: Here you can describe the facilities you have available at your provider - these could include a theatre, swimming pool, free parking, near a bus route etc.

Additional support: This section can be used to highlight what support will be available to individual learners - this could include group sessions, one-to-one tutoring etc.

Learner success: Here you can describe the success of your institution and your learners - this could include attainment figures, attendance statistics etc. Alternatively you could include information about learners who have achieved something for charity or work outside of the school.

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FOR APPLY CLIENTS ONLY

Sending provider information

Learners require approval: This box will nee ticked if you would like the option to approv of your learners.

Learners cannot add qualifications: This bo to be ticked if you would like the restrict the learners to enter their own qualifications.

Default Referee: This section allows you to of a referee to be used for every learner. To referee details, you will need to add their tit last name and their position, which can be from a series of options. The option to add number, telephone number and email addre referee is also in this section.

Please note that First name and Last name mandatory fields.

Receiving provider information

Request references for applicants: this nee ticked if you want the ability to ask an appli

d. Once the data has been edited then you will need to click 'Save'.

5.2 Adding a venue

- a. Select the 'Providers' tab on your administration homepage.
- b. You will then be provided with a list of providers that you are able to view and edit. This list is based on the permissions you have been allocated.
- d. Click the 'Create venue' button to open the template.
- details.



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c. Click the 'Venues' tab to open a list of venues already associated with your provider.

UCAS Progress

e. You will need to complete all fields marked with an asterisk before you can save the venue

Key information

Venue name: This can be the name of the building, the name it is known as locally or your provider name if you operate from one venue.

Areas: Select the area level and then enter the name of the area using the text box. For example, state 'local authority' as the area, and enter 'Cheltenham' in the text box - as that is the location of the venue.

Building	name/	/num	ber:
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Street:

Locality:

Town*:

Postcode*: This field is required and must be a full UK postcode including the space, e.g. GL52 3LZ.

Additional information

Telephone: Enter the telephone number enquirers should call.

Telephone type: Select from the drop-down menu.

Website: Enter the main website URL for the venue.

Email: Enter the address for email enquiries.

Information about this venue: This section can be used to give information about the facilities, e.g. free parking, crèche.

f. Once all mandatory fields have been added then click either 'Save' or 'Create venue and add another'. Save will provide you with confirmation that the venue has been saved. Selecting 'Create venue and add another' will save the venue and provide you with another template to populate.

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5.3 Editing a venue

To edit information currently listed about you follow the steps below:-

- a. Select the 'Providers' link on your admini home page.
- b. You will then see a list of possible provide are able to view and edit. This list is base permissions you have been allocated.
- c. Click the 'Venues' link to open a page of associated with your provider.
- d. Click on the name of the venue that you change.
- e. You will be presented with a pre-populate to edit.
- f. You are able to edit all information within template before saving. You must complete mandatory fields before clicking 'Save'.

5.4 Editing and uploading a new logo

- a. Select the 'Providers' link on your admini homepage.
- b. You will then see a list of providers that y to view and edit. This list is based on the you have been allocated.
- c. Click the 'Upload a new logo' button.
- instructions on uploading a new logo.
- size of the logo is no more than a maximum of 192 x192 pixels.
- f. Click on 'Browse' button to locate the logo you have saved.
- display in the text box.
- h. Click the 'Upload' button.



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d. You will be presented with a screen displaying an already uploaded logo if appropriate and

e. To add or update a logo, ensure that the logo is saved in PNG, JPEG or GIF format and the

g. Once you have browsed for your logo and selected 'Open', the address of the item will

- i. If the document meets the requirements of the tool, then the logo will be successfully displayed.
- j. If the format is not accurate, or the logo is too large, a message will be displayed and you will need to follow the upload instructions again.
- k. If your logo is successfully uploaded then it will display in the box on the right-hand side of the page for you to preview before it is displayed to learners.
- I. The logo will now be displayed on the provider details page when learners receive their search results.

5.5 Adding contacts

To provide a way for learners to be able to contact you, add a contact to your UCAS listings, follow the steps below:-

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- a. Select the 'Providers' link on your administration homepage.
- b. You will then see a list of providers that you are able to view and edit. This list is based on the permissions you have been allocated.
- c. Click the 'Contacts' link to open a page of contacts already associated with your provider.
- d. Click 'Create contact' to display a short template to be completed.

Contact name*: (* denotes a mandatory field) Contact email: Contact telephone:

We would recommend that all fields are completed to provide learners with a choice of ways of contacting you.

e. Once all mandatory fields have been added then click either 'Save' or 'Create contact and add another'. Save will provide you with confirmation that the contact has been saved. Selecting 'Create contact and add another' will save the contact and provide you with another template to populate.

Editing contacts 5.6

- To edit your contacts follow the steps below
- a. Select the 'Providers' link on your admini homepage.
- b. You will then see a list of providers that ye to view and edit. This list is based on the you have been allocated.
- d. Locate the contact that you wish to edit and click on the contact name.
- e. You will be presented with a pre-populated template for you to edit.
- all mandatory fields are completed before clicking 'Save'.

5.7 Adding a YouTube link

To give learners a flavour of what to expect from the course and to also market the course more effectively, follow the steps below:-

- a. Locate the video that you wish to add from the YouTube website.
- b. Locate the unique ID for the video clip contained in the URL for example: the video clip.
- the provider details.



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c. Click the 'Contacts' link to open a page of contacts already associated with your provider.

f. You are able to edit all information within the template before saving. You must ensure that

www.youtube.com/watch?v=IYTpBpCCdvg. The code highlighted in red is the unique ID for

c. Copy and paste this code into the designated box on the additional information section of

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FOR UCAS PROGRESS APPLY CLIENTS

6.0 ADDING ADDITIONAL QUESTIONS FOR RECIEVING PROVIDERS

6.1 Adding additional questions

To give providers the option to tailor their application forms, UCAS Progress have created a set of questions that can be attached to an application form. To add any additional questions follow the steps below:-

- a. Select the 'Providers' link on your administration homepage.
- b. You will then see a list of providers that you are able to view and edit. This list is based on the permissions you have been allocated.
- c. Click the 'Additional questions' link to open the additional questions page.
- d. At the top of the page you will see any additional questions already associated with applications to this provider.
- e. To add more questions click 'Select your questions'.
- f. A list of questions will be displayed for you to select and choose from. These include:
 - Statement: Ask the applicant to write a short statement on why they wish to apply to you and why they have selected the course(s)
 - Employer reference Name: Ask the applicant for the name of the referee at the employer
 - Employer reference Address: Ask the applicant for the address of the referee at the employer
 - Employer reference Postcode: Ask the applicant for the postcode of the referee at the employer
 - Employer reference Telephone number: Ask the applicant for the telephone number of the referee at the employer
 - Employer reference Email address: Ask the applicant for the email address of the referee at the employer
 - Spoken language: Ask the applicant to add their main spoken language
 - Childcare required: Ask the applicant if they require childcare provision
 - Parental consent: Ask the applicant if they have shown this form to a parent/carer
 - Career aims/goals: Ask the applicant for their career aims and goals
 - Catholic parish: Ask the applicant to add the parish they belong to if they are Catholic
 - Brother/sister: Ask the applicant for details of a brother or sister who has previously attended the school.
 - Religion: Ask the applicant to name their religion
 - Carer: Ask the applicant to state if they are a carer for a family member
 - Medical conditions: Ask the applicant to list any medical conditions that you should be made aware of

- Help in deciding courses: Ask the applicant if they would like help in deciding their course(s)
- Additional information: Ask the applicant if there is any additional information they would like to add to the application
- Welsh speaker: Ask the applicant to state whether they are a welsh speaker • Asylum seeker or Refugee: Ask the applicant to say whether they are an asylum
- seeker or refugee
- · Criminal convictions: Ask the applicant to state whether they have any unspent criminal convictions (as defined by the Rehabilitation of Offenders Act 1974) Christian ethos: Ask the applicant whether they agree with your Christian ethos Programme preference: Where the applicant has applied for two or more complete programmes of study (a complete A-level selection and a BTEC course for example) ask them to specify their preference
- Applying for boarding: Is the applicant applying for a boarding place?
- Previously boarded: Ask the applicant if they have ever boarded before at any provider • Option blocks: Has the applicant reviewed the option blocks to ensure they are applying for courses appropriately? You will need to ensure you have put your blocks
- or a link to a document outlining your blocks on your provider details page.
- g. Tick the box next to each of the questions that you would like to add to the application form.

- h. Once you have made your selection, then click 'Submit'.
- i. You will then be returned to the previous page and will see confirmation of the additional questions you have attached to the application.

6.2 Setting up reference requests

If you wish to automatically request reference UCAS Progress Apply then please follow th below.

- a. Select the 'Providers' link on your administrator homepage.
- b. You will then see a list of providers that you are able to view and edit. This list is based on the permissions you have been allocated.
- c. Select the provider that you wish to edit and click on the red highlighted link displaying the provider name. This will open a page with pre-populated details about the provider.
- d. Scroll to bottom of the page to locate the 'Receiving provider information'.
- e. Within this section there is the option to request references through UCAS Progress Apply automatically.



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Please note: Any questions that you choose to add to the application will be mandatory

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- f. To ensure that you are able to request references through the system make sure this box is ticked and click save. If you choose this option, upon receipt of an application, the system will automatically alert the Learner Manager of that there is a learner awaiting a reference.
- g. If you do not wish to receive references through the system, then please ensure that this box is not ticked.

Please note: applications can be received without references attached and will be sent retrospectively

- 6.3 Adding a 'Before you apply' message
 - a. Select the 'Providers' link on your administrator homepage.
 - b. You will then see a list of providers that you are able to view and edit. This list is based on the permissions you have been allocated.

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- c. Select the provider that you wish to edit and click on the red highlighted link displaying the provider name. This will open a page with pre-populated details about the provider.
- d. Scroll to the bottom of the page to locate the 'Before you apply' information section.
- e. Within this section is the option to create a 'Befor you apply' message.
- f. Tick the box to enable further information.
- g. Write the message text in the free text box. Please note the limit of this box is 8000 characters.
- h. You have the option to add in a website link which could for example link to your own provider website, option block etc.

SENDING PROVIDER INFORMATION 7.0

Setting sending provider permissions 7.1

- a. Select the 'Providers' tab on your administration homepage.
- b. You will then be provided with a list of providers that you are able to view and edit. This list is based on the permissions you have been allocated.
- c. Select the provider that you wish to edit and click the red highlighted link displaying the provider name. This will open a page with pre-populated details about the provider.



- d. Scroll down the page to locate the 'Send information' section. Within this section options:
 - i. Learners Require Approval: This option enables provider managers to determine whether they would like to review the profile information completed by learners before an application can be sent. By ticking this box, you are setting the default of the provider approval process to a yes.
 - Within the learner information there is the ability to: Use the provider default: this will be the permission set in this section Yes: the ability to turn this function on for that individual learner No: overrides the default position of what has been set in this section and ensures that the profile is not referred for approval.
 - ii. Learners cannot add qualifications: This option enables provider managers to determine whether been set to 'Yes'.

Within the learners information there is the ability to: Use the provider default: this will be the permission set in this section Yes: the ability to turn this function on for that individual learner No: overrides the default position of what has been set in this section and ensures that the profile is not referred for approval.

7.2 Adding a Default Referee

Within this section of the provider information, you have the ability to set a default referee that will appear on each learners application form. The person listed as the default referee does not need to be the person who completes the reference, but could be the person who should be contacted to choose a reference.

a. Select the 'Providers' tab on your administration homepage.



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they would like the option to add learner qualifications on a learner's behalf. By ticking this box, you are setting the default of the provider approval process to a yes. If you wish to use the bulk uploading of qualifications function, you need to ensure that this has

e. Once you have set these permissions then click save at the bottom right of the page.



- b. You will then be provided with a list of providers that you are able to view and edit. This list is based on the permissions you have been allocated.
- c. Select the provider that you wish to edit and click the red highlighted link displaying the provider name. This will open a page with pre-populated details about the provider.
- d. Scroll to the bottom of the page to the 'Default Referee' section.
- e. To add details of the default referee, enter:
 - i. Title Mr, Miss, Ms, Mrs or Dr
 - ii. First Name First name of the referee
 - iii. Last Name Last name of the referee
 - iv. Position Head teacher, Assistant head, Deputy head, Head of year, Pastoral manager, teacher, Form tutor, House tutor, Inclusion officer or Progression officer
 - v. Mobile number add in a mobile number for the referee
 - vi. Telephone number add in an additional contact number
 - vii. Email address add in the e-mail address of the referee

Please note the first and last name of the referee are mandatory fields.

f. Once you have entered these details then click save at the bottom right of the page.

Where providers require reference details, this information will become the default referee. A Learner Manager does however have the ability, when completing the reference, to create an alternative referee.

CREATING AND MANAGING LEARNER GROUPS AS A PROVIDER MANAGER 8.0

As a Provider Manager you have the ability to create learner groups and associate learner managers with these groups. Within each provider it is recommended that there is at least one Provider Manager with an overview of all students in the school.

Before learner groups are created it is very important to make sure that all Provider Managers, User Managers and Learner Managers are set up in the system and all of the learners have been imported. The ability to associate learner managers with learner groups can be also done by a Learner Manager with visibility of all learners within an individual provider.

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8.1 Creating Learner groups:

- link associated with the provider where you would like to create a user group.
- b. Click the 'Create a learner group' button in the top left of the page and complete the template.
- at the bottom of the page.

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- d. If the Provider name is not listed here, sta the name of the provider in the text box a letters have been typed a list providers as with your user account will start to appea the provider(s) you wish to associate the groups with and that will then appear unc the provider box.
- e. Click 'Save' and the learner group will be saved, ready for you to associate learner managers and learners with the group.

N.B: Please note that you can associate one learner group with multiple providers

8.2 Associating a Learner manager with a learner group. To ensure learner managers have access to the right amount of information, ensure all Once all learners have been associated with the correct groups, a Provider Manager can allocate appropriate Learner Managers to these groups.





A learner group could be a tutor groups, learning support groups or a teaching groups.

a. To create a learner group, click on the 'Provider' tab and then click on the 'Learner groups'

c. Enter a 'Learner group name' and check that the correct Provider name is displayed



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learners are associated with the learner groups before you associate learner managers.

a. Click on the 'Provider' tab and then click on the 'Learner groups'.

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- b. Click on the associated 'Learner Manager' link with the associated learner group. A list of Learner Managers associated with your provider will be displayed.
- c. Click on all learner managers to be associated with that group. If more than one learner manager is to be assigned to a group hold down 'Ctrl' and click on each learner manager. When a Learner manager is associated with the group, they will then be highlighted in blue.

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- d. Once a Learner manager is allocated to a group or groups they will only be able to see Learners within that group or groups rather than the whole cohort. If a Learner manager is not associated to any learner group they can then see all learners in the cohort. This could for example be Head of Year 11.
- e. To allocate Learner managers to more than one group, go into each learner group and assign that learner manager to the group in the same way as above.

8.3 How to un-assign a Learner Manager from a Learner group

- a. If a Learner Manager needs to be removed from a group, click on the 'Providers' link at the top of the screen and click on the 'Learner groups' link associated with that provider.
- b. Click the 'Learner Managers' tab against the Learner group they need to be removed from.
- c. You will be presented with a scrolling list of all learner managers in the system at your Provider.
- d. Those assigned to the particular group you are in will be highlighted in blue.
- e. To un-assign a learner manager from a group hold down Ctrl and then click on the relevant learner manager.

9. **PROVIDER REPORT**

As a Provider Manager you have access to an Application Report. This report enables you to view all applications received into you as a provider in a report. From this report you will be able to identify the number of learners at each application status and will also be able to get an indicator of the number of learners who have applied for each of your listed course.

Reports are published on a weekly basis, and every Monday will they are updated with any changes that have been made in the previous week.

To locate and export the courses follow the steps below:

- a. Click on the 'Reports' link at the top of your homepage.
- based on your permission roles.
- c. Locate the provider report and click the 'Download' button.

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- d. You will then be asked whether you wish to 'Open with' or 'Save file'
- where you would like to store the file.
- f. If you choose to 'Open with', the file will open in an Excel format.

	A	8	C	D
1	Provider Name	Providers LA Area	Provider Profile Page Hit Rate	Total number of times favourited
2	Example School	Gloucestershire	48	43
3	Example College	Gloucestershire	36	28
4	Example Training Provider	Gloucestershire	41	16
5				

- g. The report will include:
 - a. Information Sheet
 - b. Provider report.

10. LINKING TO THE MAIN SITE

Along the top bar there is a 'main site' link, this takes you back to the homepage of the learner site.







b. You will be presented with a list of reports that you have access to view and download





e. Clicking 'Open with' will automatically open the file using WinZip and will enable you to access the excel file. If you choose to 'Save file', you will be asked to choose the location

UCAS Progress Support Team

The Support Team is available to support clients with technical enquiries and system requests relating to existing UCAS Progress products and services.

The Support Team can be contacted on 08714 682 568 Option 1 or at ucasprogresssupport@ucas.ac.uk.

UCAS Progress Training and Implementation Team

The Training and Implementation Team is on-hand to support clients and users with product implementation and training, either by telephone or in face-to-face sessions. In addition to our core programmes, they can devise and deliver programmes to meet your specific requirements.

The Training and Implementation Team can be contacted on 08714 682 568 Option 2 or at ucasprogresstraining@ucas.ac.uk.



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