Learner manager manual
Search and Apply

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

UCAS
Progress

LEARNER MANAGER SEARCH AND APPLY MANUAL

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 the 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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CONTENTS

1.0   INTRODUCTION TO UCAS PROGRESS SEARCH AND APPLY

1.1   What is Search and Apply?

UCAS Progress Search and Apply provide learners with the opportunity to search for 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 Learner Manager?

A Learner Manager has responsibility for creating and managing learner accounts. A Learner Manager has the ability, where permissions are granted, to view learners at multiple and individual providers.

As a Learner Manager you can:

- view learners at the provider(s)
- search for learners at the provider(s)
- create learners at the provider(s)
- edit learners at the provider(s)
- delete learners at the provider(s)
- view and approve learner profiles
- add in learners' qualifications
- edit information within a learner profile
- review whether learners have submitted an application
- review number of learners with offers
- add learners into learners groups.

1.3   What is the purpose of the administration site?

The administration area provides tools to create and manage learners at individual providers or across multiple providers within one site.

1.4   How will I receive my 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 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 your password?' link to the right of the login 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 'Account' on the UCAS Progress administration homepage. From here you can edit your personal details, username and password.
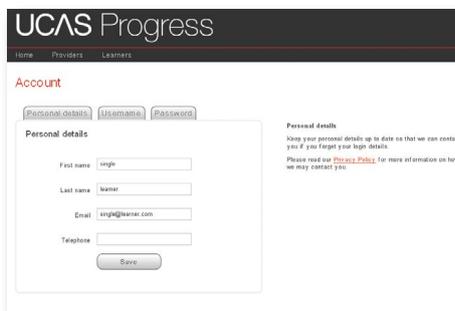
3.2 Editing personal details

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

3.3 Editing your username.

In this section you can change your username to something more memorable. The username must be between six and 256 characters and may contain letters, numbers or a few select characters (@.-_). When you have finished the 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 your new password. Your password must be between six and 20 characters and contain at least one letter and one symbol or a number. When you have finished making your updates click 'Save'.

4.0 MANAGING YOUR DASHBOARD

Your dashboard enables you to have an overview of the role that you have and highlights areas you may want to have a look at. For example as a learner manager you can see detailed information about your learners such as those that are locked out or never logged in, those with incomplete profiles, those with applications etc. You can see these by clicking on the red hyperlinks.

From here you can see a total number of learners allocated to you as a learner manager.

Learner manager

As a learner manager you can oversee and administer the learners that are assigned to you. This includes adding and editing learners as well as resetting passwords and unlocking learners.

Learners	0
Never logged in	0
Locked out	0
With incomplete profiles	0
Awaiting profile approval	0
Learners awaiting qualifications	0
Learners awaiting references	0
Learners with applications	0
Learners with no applications	0
Learners with no offers	0

This section will show how many learners have never logged into the site or activated their account. You can also see the number of learners who have locked themselves out.

From here you are able to start to identify learners who may potentially need additional help or support in making their application. To be able to see their details on any of the links, click through to the learners with incomplete profiles or with no applications.

You can also see learners where activities are required by you as a Learner Manager, and view the activities of those learners who have already submitted applications.

5.0 CREATING AND MANAGING LEARNER ACCOUNTS

5.1 Creating a new learner

The steps below describe how to create a new learner using the learner template. It is best to use these steps when there are only individual learners to add. If you have a number of new learner accounts to create, use the bulk import section of this guide, see section 7.

a. Click the 'Learners' tab along the top menu bar.

b. Click 'Create Learner'.

c. You will now need to fill in the key information for the new learner. Firstly, fill in their username and password. The username field is mandatory and must be between six and 127 characters. It can contain letters, numbers or a select few characters (@._-).The password field is also mandatory and must be between six and 20 characters and contain at least one letter and one symbol or number.

   Please note that the learner will be prompted to change their password upon first login.

d. You will now need to fill in the key information for the new learner: the learner's first name, last name, date of birth and the academic year that they are currently in. Then select from the drop-down list of providers to choose where the learner is currently attending. You can also add an email address for a learner if you wish to.

e. Within the Profile section of this page, there are a couple of options that will need to be specified. These are split into two sections:

   a. Sign off learner's profile?

   i. Use Provider default – this will mirror the option that the Provider Manager has chosen for profile approval.

This section is used to specify whether you would like to see the learner profile before the application is submitted.

  ii. Yes – this will enable you as a Learner Manager to approve the profile of the learner before an application is submitted.

  iii. No – the learner's application will be submitted without the need for a Learner Manager to approve the profile.

  b. Select whether or not you wish to add qualifications on behalf of learner

This section is used to specify whether you would like to add learner qualifications to the profile on their behalf.

  i. Use Provider default - this will mirror the option that the Provider Manager has chosen for adding qualifications.

  ii. Yes - this will enable you as a Learner Manager to add qualifications to the profile of the learner before an application is submitted.

  iii. No - the learner's application will be submitted without the need for a Learner Manager to add qualifications.

  f. If you want to add in address details, the ULN, CCIS or UPN number for the learner and their gender and ethnicity details, complete the additional section of the page.

  g. Once you have added all the information, click 'Save' or 'Create learner and add another'.

5.2   Managing your learners

  a. Click the 'Learners' tab along the top menu bar.

  b. You will see a list of all learners linked with your provider(s), including their usernames, their first and last names, email addresses, and the status of their profile sections. From here you will be able to reset their passwords, unlock them if they have locked themselves out, and also delete learners.

  c. To access a learner account; identify how they are progressing with the profile; and view the information they have entered - locate the learner you wish to view using the search box in the top left of the page and click on 'View profile'. You will be presented with the learner summary page of the profile.

  d. To access a learner account to edit their information, click on their name. This will display their key information, profile statements and additional information.

e. Using either the tabs across the top or in the middle of the page, select which section to view or edit.

f. For learners who have already completed the sections of their profile, you will need to select 'Update my personal information' to be able to edit any fields. If the learner has not yet completed sections, the template will be editable immediately.

g. If you make any changes to the learner profile on the learner's behalf, ensure you save the section or mark as complete where the sections where previously completed.

5.3 Identifying learners who have not logged in/ downloading learners usernames and passwords

a. To locate and identify learners who have not logged into the system, either use the dashboard link titled 'Never logged in' or click the 'Learners' tab in the top menu bar.

b. If you use the dashboard link, you will be presented with a list of those learners who have not yet logged on in a list on the screen, if you have chosen to link through the 'Learners' tab, then you will see a list of all learners linked with your provider(s), including their username, their first and last names and email addresses.

c. At the top of the screen there will be an option to view the details of the learner including their username and password, by clicking on 'Learnerswho have not logged on'.

d. From this page, you will then have the option to 'Download learners who have not logged on' into a spreadsheet. You then have the ability to distribute this information to learners as this contains their usernames and passwords.
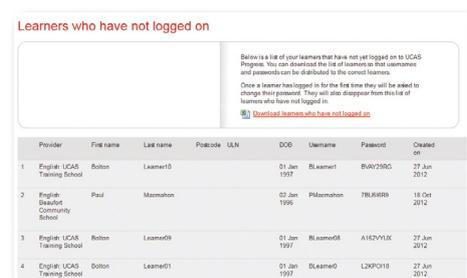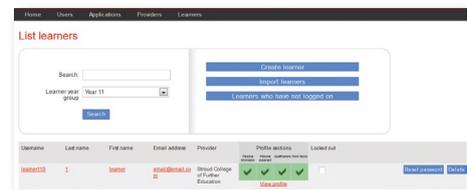
5.4 Adding qualifications to a learner profile

Adding qualifications to the learner profile information can be activated for an individual learner, a group of learners or for the whole cohort. If you choose to add qualifications these will need to be added into the learner's profile before they are able to submit an application.

a. Click the 'Learners' tab along the top menu bar to see a list of all learners linked with your provider(s), including their usernames, their first and last names, email addresses, and the status of their profile sections. From here you will be able to reset their passwords, unlock them if they have locked themselves out, and also delete learners. Alternatively click on the 'Learners awaiting qualifications' link on the dashboard.
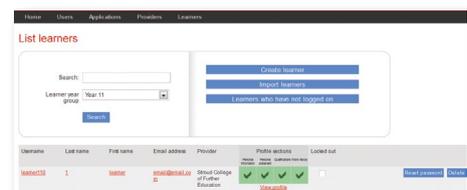
b. To access a learner account; to enter qualifications - locate the learner you wish to view using the search box in the top left of the page.

c. Click on the 'View profile' link, to see the detail of the learner profile.

d. You will then be presented with the learner summary page, and from here you are able to view and edit sections of their profile.

e. To locate the qualifications section of the profile, click on the 'Qualifications' tabs across the top of the page.

f. You will be presented with a qualifications page, with the option to 'Start adding your qualifications'.

g. Click on the 'Start adding your qualifications' button.

h. You will be presented with a page to add in the type of qualification that you want to add. Choose the type from the drop down list and click 'Next'.

i. Complete the template for the qualification, by filling out the following fields:

   a. Subject – this will only include the relevant subjects relating to the qualification type chosen.

   b. Completion date – choose month and year from the drop down list

   c. Predicted grade or Actual grade – choose from the drop down list or add in the grade to the free text box.

j. Click 'Save' or 'Save and add another qualification'.

k. Clicking 'Save' will return you to the main qualifications screen. If you have added all the qualifications for the learner, click on 'I have added all of my qualifications' to mark the section as complete.

l. Clicking 'Save and add another qualification', will return to the 'Select Qualification' screen and will step through the template again. Once you have added all the qualifications then follow step i, as above.

5.5   Adding a reference to a learner profile

References can be added to a learner's application before or after submission. Any updates made to the reference at any time will be reflected in new applications only.

a. Click the 'Learners' tab along the top menu bar to see a list of all learners linked with your provider(s), including their usernames, their first and last names, email addresses, and the status of their profile sections. From here you will be able to reset their passwords, unlock them if they have locked themselves out, and also delete learners.

Alternatively click on the 'Learners awaiting references' link on the dashboard.

b. To access a learner account; identify how they are progressing with the profile; and view the information they have entered - locate the learner you wish to view using the search box in the top left of the page.

c. Click on the 'View profile' link, to see the detail of the learner profile.

d. You will then be presented with the learner summary page, and from here you are able to view and edit sections of their profile.

e. To locate the references template click on the 'Reference' tab across the top of the page.

f. At the top of the page the details of the default referee will be displayed with the option to 'Add a different referee'. The reference template to be completed will be below.

g. If you wish to add different referee details, click 'Add a different referee' at the top of the page, complete the template displayed and click 'Save'.

h. Once the correct referee is listed at the top of the page, then complete the reference template, ensuring that you choose whether to display the reference to the learner by choosing 'Yes' or 'No' at the top of the page.

i. Once you have added the reference information, either click 'Save reference details' if you perhaps have more information to add or click 'Complete reference details' if you are finished and want the details to be attached to the application form.

5.6 Profile Approval

The approval process for learner profile information can be activated for an individual learner, a group of learners or for the whole cohort. If you choose to implement this step in the application process, the profile of the learner will need to be approved before the application can be submitted.

a. Click the 'Learners' tab along the top menu bar to see a list of all learners linked with your provider(s), including their usernames, their first and last names, email addresses, and the status of their profile sections. From here you will be able to reset their passwords, unlock them if they have locked themselves out, and also delete learners. Alternatively click on the 'Awaiting profile approval' link on the dashboard.
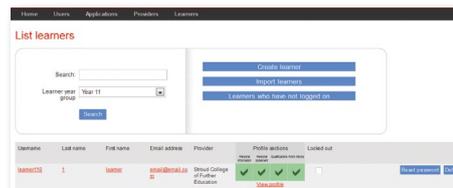
b. To access a learner account, identify how they are progressing with the profile and view the information they have entered - locate the learner you wish to view using the search box in the top left of the page.

c. Click on the 'View profile' link, to see the detail of the learner profile.

d. You will then be presented with the learner summary page, and from here you are able to view and edit sections of their profile.

e. Review the sections of the profile that you wish to amend and make any necessary changes.

f. Once you are happy that you have approved all the necessary sections, click 'Approve Profile'.

g. This will update the profile and where there are pending applications, they will automatically be submitted.
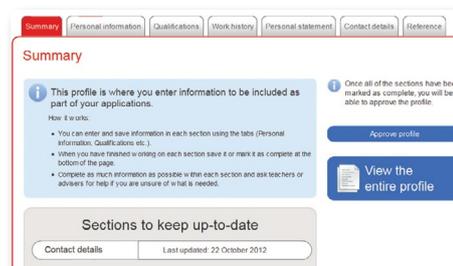
h. The learner profile will at this point be updated and a message will be displayed for the learner to view.

i. If at any point the learner makes any changes to the profile, it will be resubmitted to their Learner Manager and will become un-approved. As a Learner Manager you are also able to select 'Un-approve profile'.

6.0   MANAGING LEARNERS AT MULTIPLE PROVIDERS

This is information for users who operate in a role across multiple providers. There are two methods of creating a new learner; these are described in 5.1 and 7.2. The method for managing your learners is described in section 5.2.

6.1   Creating learners through the 'Providers' tab.
You can access learner details through the 'Providers' tab along the top menu. You will then see a list of providers where you are responsible for learners.

a. To add a learner at a particular provider, click on the learner hyperlink for that provider and a list of learners associated with that provider will be displayed.

b. Click 'Create learner'.

c. You will now need to fill in the key information for the new learner. Firstly, fill in their username and password. The username field is mandatory and must be between six and 127 characters. It can contain letters, numbers or a select few characters (@._-). The password field is also mandatory and must be between six and 20 characters contain at least one letter and one symbol or number.

   Please note that the learner will be prompted to change their password upon first logging in.

d. You will now need to fill in the remaining key information for the new learner, the learner's first name, last name, email address, and the academic year that they are currently in. Then select from the providers' drop-down list to choose where the learner is currently attending.

e. Within the Profile section of this page, there are a couple of options that will need to be specified. These are split into two sections:

   This section is used to specify whether you would like to see the learner profile before the application is submitted.

   a. Sign off learner's profile?

   i. Use Provider default – this will mirror the option that the Provider Manager has chosen for profile approval.

   ii. Yes – this will enable you as a Learner Manager to approve the profile of the learner before an application is submitted.

   iii. No – the learner's application will be submitted without the need for a Learner Manager to approve the profile.

   b. Select whether or not you wish to add qualifications on behalf of learner

This section is used to specify whether you would like to add learner qualifications to the profile on their behalf.

      i. Use Provider default - this will mirror the option that the Provider Manager has chosen for adding qualifications.

     ii. Yes - this will enable you as a Learner Manager to add qualifications to the profile of the learner before an application is submitted.

    iii. No - the learner's application will be submitted without the need for a Learner Manager to add qualifications.

   f. If you want to add address details, the ULN, CCIS or UPN number for the learner, then complete the additional section of the page.

   g. Once you have added all the information, click 'Save' or 'Create learner and add another'.

6.2   Creating learners through the 'Learners' tab
   a. Click on the 'learners' tab along the top menu bar.

   b. Click 'Create learner'.

   c. Now follow steps 6.1 e - h as set out above.

6.3   Managing your learners through the 'Learners' tab
In this section you have the ability to view and edit learner profile details. By following the steps below you can view what learners have written and amend those details.

   a. Click the 'Learners' tab along the top menu bar.

   b. You will see a list of all learners linked with your provider(s), including their usernames, first and last names, email addresses, and the status of their profile sections. From here you will be able to reset their passwords, unlock them if they have locked themselves out, and also delete learners.

   c. To access a learner account and identify how the learner is progressing with the profile and view the information they have entered, locate the learner you wish to view and click on 'View profile'.

   d. You will be presented with the learner summary page of the profile.

   e. Using either the tabs across the top or in the middle of the page, select which section to view or edit.

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f. For learners who have already completed the sections of their profile, you will need to select 'Update my personal information' to then be able to edit any fields. If the learner has not yet completed sections, the template will be editable immediately.

g. If you make any changes to the learner profile on the learner's behalf, ensure you save the section or mark as complete where the sections were previously completed.

h. To access a learner account to edit their information, click on their name. This will display their key information, profile statements and additional information.

6.4 Identifying learners who have not logged in

a. To locate and identify learners who have not logged into the system, either use the dashboard link titled 'Never logged in' or click the 'Learners' tab in the top menu bar.

b. If you use the dashboard link, you will be presented with a list of those learners who have not yet logged on in a list on the screen, if you have chosen to link through the 'Learners' tab, then you will see a list of all learners linked with your provider(s), including their username, their first and last names and email addresses.

c. At the top of the screen there will be an option to view the details of the learner including their username and password, by clicking on 'Learners who have not logged on'.

d. From this page, you will then have the option to 'Download learners who have not logged on' into a spreadsheet. You then have the ability to distribute this information to learners.

7.0   INTRODUCTION TO LEARNER IMPORT TOOL

The import function can be used to import your learners into UCAS Progress and auto-generate usernames and passwords, enabling them to access their accounts and save favourites. The import function should be used to import a number of learners at the same time. The learner import function is available to all Learner Managers.

7.1   Enabling the learner qualification import tool
To ensure you are able to upload your learner qualifications the provider manager within your provider will need to enable the 'learners cannot add qualifications' function. By enabling this function learners will be able to add their own qualifications and will require them to be added before their application can be sent.

7.2   Accessing the learner template
In order to upload learner data into UCAS Progress you will need to populate the template provided. To access and download the template, follow these steps:

a. Click on the 'Learners' tab from the administration area. This will display a list of learners already added to your provider, along with their username, last name, first name and email address.

b. Click the 'Import learners' button. This will display any previous imports that you have carried out and their status. You can also download a blank template and import learners into UCAS Progress Search from this page.

c. Select 'Download learner import template' - a blank template will be displayed.

d. Add the learner data into the spreadsheet, ensuring all mandatory fields are completed and save as a Microsoft Excel (.xls) document

7.3   Inputting data into the spreadsheet
Where possible all columns should be populated with data. However, to ensure the import is successful you need to make sure that all the mandatory fields are completed and, where necessary, the format is correct.

UKPRN - the UK Provider Reference Number of the provider to which you wish to add learners. This creates a link between the learner and the provider on UCAS Progress. The number has to match exactly to the UKPRN of the provider on UCAS Progress. This is a mandatory field.

Learner year group - the year group that the learner is currently in. This is a mandatory field.

First name - the first or given name of the learner. This is a mandatory field.

Last name - the last or family name of the learner. This is a mandatory field.

Postcode - the learner's postcode. This is a mandatory field.

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Dob - the learner's date of birth, using the date pattern YYYY-MM-DD. This is a mandatory field.

Email address - the primary email address of the learner. This can be either a school or personal email address.

House name or number - the first line of the learner's address. This is usually their house name or number.

Street - the second line of the learner's address. This is usually their street name.

Locality - the third line of the learner's address. This is usually a particular neighbourhood, place, or district.

Town - The fourth line of the learner's address. This is usually their town or city.

Telephone - the primary telephone number for the learner.

ULN - the Unique Learner Number of the learner.

**UPN** - the Unique Pupil Number of the learner.

CCIS - the CCIS young person record ID.

Gender - the learner's gender, this should be either Female, Male, Not known or Not specified.

Ethnicity - the ethnic origin of the learner, based on the 2011 census. This should be input in one of the following formats: English / Welsh / Scottish / Northern Irish / British, Not provided, Irish, Gypsy or Irish Traveller, Any other white background, White and Black Caribbean, White and Black African, White and Asian, Any other mixed / multiple ethnic background, Indian, Pakistani, Bangladeshi, Chinese, Any other Asian background, African, Caribbean, Any other Black African / Caribbean background, Arab, Any other ethnic group.

7.4 Importing learners

a. Click on the 'Learners' tab from the administration area. This will display a list of learners already added to your provider, along with their username, last name, first name and email address.

b. Click on the 'Import learners' button. This will display any previous imports that you have carried out and their status. You can also download a blank template and import learners into the UCAS Progress Search.
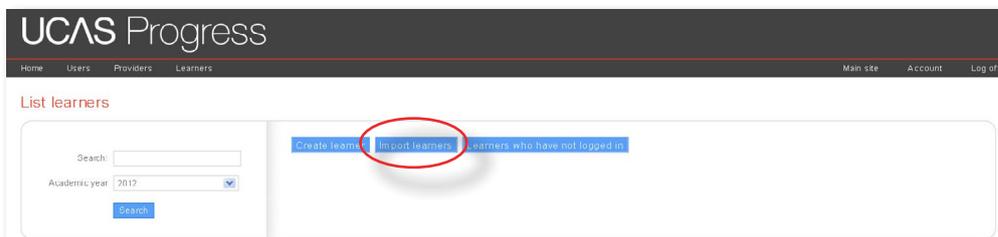
c. Click the 'Browse' button to locate the spreadsheet containing the learner data and then click open.
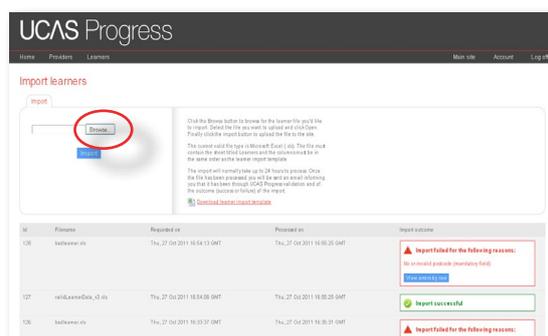
d. The location of the document will populate in the 'Browse' box. Click 'Import' and the request will start to process.

e. Once you have made the request, the import to be processed will display in the list, including the date and time it was requested.

f. Once the import has been through the validation process, the person uploading the data will receive an email. The date it was processed and the outcome of the import will then be displayed alongside the requested information.

g. If the import was unsuccessful, there will be a description as to why this failed and the ability to view these particular errors by row. To re-import the data successfully, make the changes to the spreadsheet and re-import to the system.

h. If the import was successful then follow steps 7.2 a –d to get a list of all your learners.

The import can take up to 24 hours to process. Once the file has been processed you will be sent an email informing you that it has been through the UCAS Progress validation and the outcome (success or failure) of the import.

7.5   Viewing learners who have not logged in

Once you have imported the learners into UCAS Progress, their passwords and usernames will be automatically generated. The usernames and passwords then need to be distributed to the learners. When a learner first logs in they will be prompted to change their password. You will be able to view a list of learners who have not logged in. Follow these steps to view the list:
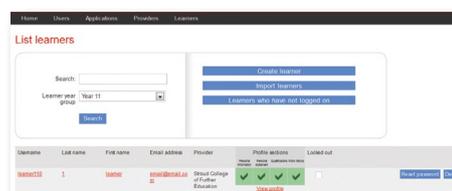
a. Click on the 'Learners' tab from the administration area. This will display a list of learners already linked to your provider, along with their usernames, last names, first names and email addresses.

b. Click the 'Learners who have not logged in' button to view a list of learners on screen who have yet to access the system.

c. From this list you will be able to view the learners' details including their personal details, usernames and passwords that were automatically created, the date they were created and the provider they are linked with.

d. From this page you will also be able to download an Excel spreadsheet of those learners who have not yet logged in.

8.0 LEARNER GROUPS

As a Learner manager you have the ability to associate learners with already created groups. Learner groups are created by either a Provider Manager or a User Manager, and will need to have been created before learners can be associated.

The ability to associate learner managers with learner groups can be done by a Learner Manager not assigned to any learner group within an individual provider. Within each provider there needs to be at least one Provider Manager, User Manager and Learner Manager with an overview of all students in the school in order to create groups and assign learners.

We would recommend that there is at least 1 Learner Manager within a provider that is not associated with any learner groups.

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.

Learner groups could be used for learners in tutor groups, learning support groups or teaching groups.

8.1 Associating learners with groups:
   a. Click on the 'Provider' link to access the learner groups.

   b. Click on the 'Learner groups' button, then click on the 'Learners' link of the group you would like to associate learners with.

   c. A list of the learners associated with the provider(s) will be displayed in a scrolling list. Click in the tick box to associate learners with the particular group. Any learners already associated with that group will already be ticked.

NB: learners can be associated with multiple learner groups e.g. tutor groups, SEN group, gifted and talented etc.

d. Every time a group is set up, all of the year group will be visible allowing the Learner manager with a view of the whole school to select which learners need to be allocated to that group.

8.2 Un-assigning a learner from a group:

a. If a learner needs to be removed from a group, go to the 'Providers' tab and then click on the 'Learner Group' tab.

b. Click the 'Learners' tab against the name of the group that you wish to remove the learner from.
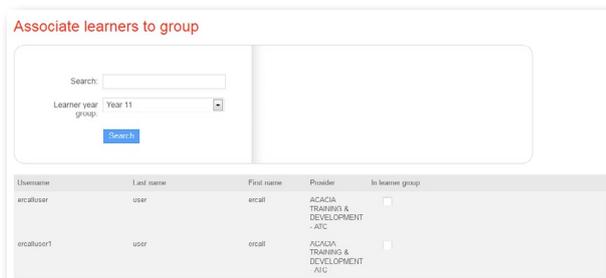
c. You will then be presented with all of the Learners in the Year group and you will be able to see those allocated to that group by the green tick in the 'In Learner Group' section.
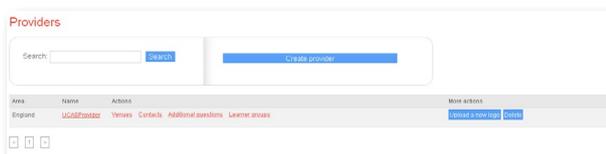
d. Either scroll down the list or add the name of the learner you would like to remove from the group in the search box at the top left hand side of the screen.
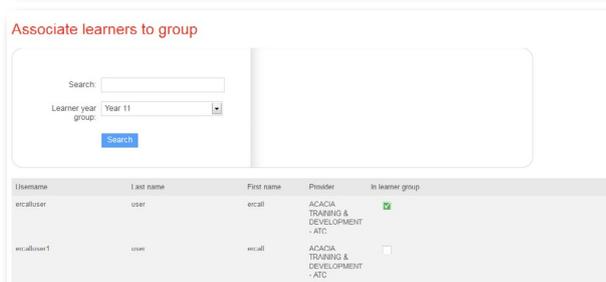
e. When the learner is visible, click in the box that has the green tick and that will un-assign that learner from that group.

f. If they need to be re-assigned again at a later date, go through the same process as above (steps 1. a-d).

9.0 BULK QUALIFICATION UPLOAD

Bulk Qualification upload can be used by learner managers to upload qualifications to each individual learner account. This assists both learners and receiving providers in ensuring that the qualifications received are correct, accurate and have been verified. To upload learners qualifications, you need to ensure that your provider manager has ticked the 'Learners cannot add qualifications' box, to set your provider default as adding qualifications on behalf of the learners that you wish to import qualifications. This could be the entire cohort or a selected group of learners. Then ensure that all learners have been uploaded into UCAS Progress. To upload learner qualifications follow the steps below:

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9.1 Exporting Learner Data

a. Click the 'Providers' tab along the top menu bar, and click the corresponding 'learner' link.

b. You will see a list of all your learners, their username, personal details and their progress so far with the profile.
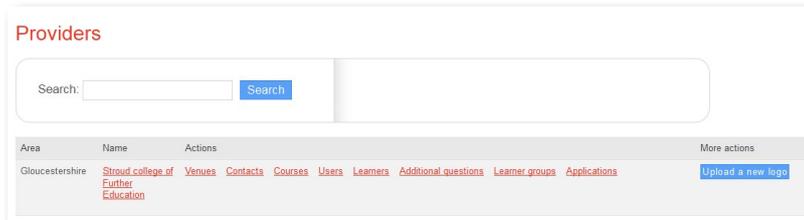
c. At the top right of the page, there will be 4 options, 'Create learner', 'Import learners', 'Learners who have not logged on' and 'Learner qualifications import/export'.

d. Click 'Learner qualifications import/export'.

e. The import/export tool will default to the export function. From here you will need to export your learners. Choose from the Learner year group drop down the year group that you wish to import the qualifications for and click 'Export'.
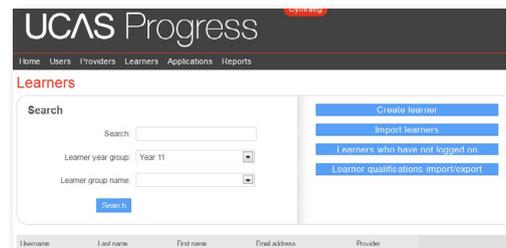
f. The export will start to process and will take around one hour to process.

g. You will receive an email to let you know when the export is complete.

h. Once your export have been successfully completed log back into UCAS Progress and follow steps a – d. Underneath the export option you will see your requested import, with the option to download.

i. Click download and follow the steps to download the file through WinZip.

j. Once the file is downloaded, make the necessary changes to the spreadsheet ready to re-import the data back into UCAS Progress and save the file in an Excel format

Please note: your exported learners will be available to download at quater past every hour.

9.2 Inputting data into the Spreadsheet

On the downloaded spreadsheet, there will be a number of columns that are already populated with information based on what has been imported as part of the initial learner upload.

On the downloaded spreadsheet, there will be 4 sheets, 3 of the sheets include the valid information that will need to be included to ensure the import is successful and the remaining sheet is where the learner's qualifications will need to be added. Mandatory fields are marked with an asterisk.

Qualification type – On this sheet, there is a list of qualifications that the system will accept and will need to be used when entering the qualifications.

Qualification Subject– On the second sheet there is a list of qualifications listed by qualification type. These will need to be used when entering the subjects for each student.

Qualification Grading – On the third sheet there is a list of the possible qualifications for each qualification type.

Learner Qualifications – On the fourth sheet, there is a list of fields relating to the learners exported.

This information includes:

UCAS Account ID – this will need to remain on the spreadsheet and is a unique code that allows the system to match up the details on the import with the learner details on UCAS Progress.

UPN – this is the Unique Pupil Number which will be populated if this has been provided on import.

ULN – this is the Unique Learner Number which will be populated if this has been provided on import.

Forename – the first name of the learner and will be populated with the information provided as part of the upload.

Surname – the surname of the learner and will be populated with the information provided as part of the upload.

Date of Birth – this is the provided as part of the learner upload and will be pre-populated.

Current Provider – this will be populated with the provider name that the learners are linked to.

Current Area – This will be the current local authority area the learners are linked to.

Qualification Type 1*- Enter in this field a Qualification type from the list on the 'Qualification Type' sheet.

Qualification Subject 1*- Enter in this field a Qualification Subject from the list on the 'Qualification Subject' sheet.

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Progress

Qualification Completion Date 1 – Enter in this field the examination date of the subject the learner is taking, in the format YYYY-MM.

Qualification Predicted Grade 1* – Enter in this field the predicted grade of the learner using the list on the 'Qualification Grading' sheet.

Qualification Actual Grade 1*- Enter in this field the actual grade of the learner using the list on the 'Qualification Grading' sheet. **Either a predicted grade, actual grade or both must be filled in.**

NB: complete the Qualification Type, Qualification Subject, Qualification completion Date, Qualification Predicted Grade and Qualification Actual Grade multiple times to list learner subjects. Can input up to 18 for each student.

9.3 Importing Learner Data
When importing the spreadsheet you should NOT change the UCAS Account Id, Forename, Surname, Date of Birth, Current Provider, and Current Area.
  a. Click the 'Providers' tab along the top menu bar, and click the corresponding 'Learner' link.
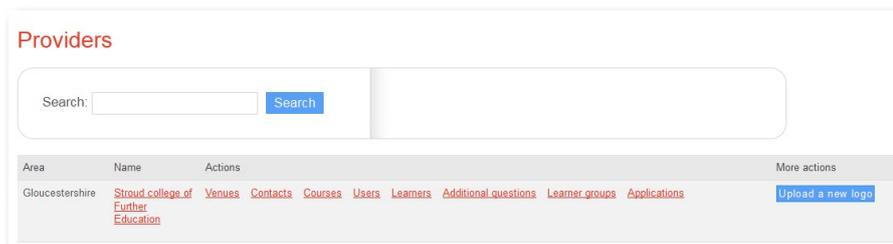
  b. You will see a list of all your learners, their username, personal details and their progress so far with the profile.

  c. At the top right of the page, there will be 4 options, 'Create learner', 'Import learners', 'Learners who have not logged on' and 'Learner qualifications import/export'.
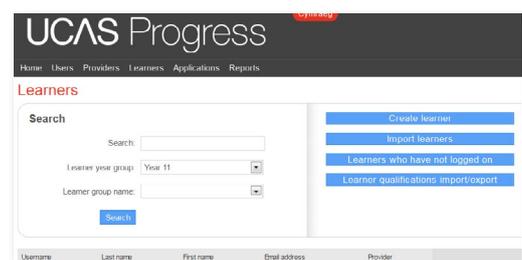
  d. Click 'Learner qualifications import/export'.

  e. The import/export tool will default to the export function. Click on the 'Import' tab, this will display any previous imports that you have carried out and their status.

  f. Click the 'Browse' button to locate the spreadsheet containing the learner data and then click open.
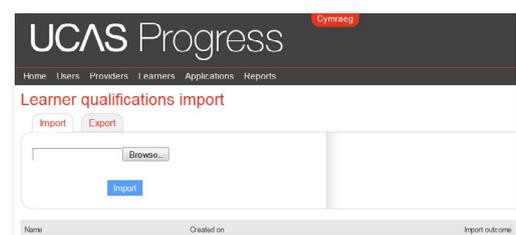
  g. The location of the document will populate in the 'Browse' box. Click 'Import' and the request will start to process.

h. Once you have made the request, the import to be processed will display in the list, including the date and time it was requested.

i. Once the import has been through the validation process, the person uploading the data will receive an e-mail. The date it was process and the outcome of the import will then be displayed alongside the requested information.

j. If the import was successful, there will be a description as to why this failed and the ability to view these particular errors by row. To re-import the data successfully, make the changes to the spreadsheets and re-import into the system.

The import can take up to 24 hours to process. Once the file has been processed you will be sent an email informing you that it has been through the UCAS Progress validation and the outcome (success or failure) of the import.

10.0 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.

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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