MIS learner application data import and export manual

Introduction to Search and Apply

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

UCAS
Progress

MIS LEARNER APPLICATION DATA IMPORT AND EXPORT 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 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

CONTENTS

Appendices - available to download

Appendix A: New Application Data Definition
www.ucas.com/documents/external/progress/MISmanual_appendixA.xlsx

Appendix B: Updated Application Data Definition
www.ucas.com/documents/external/progress/MISmanual_appendixB.xlsx

Appendix C: Import Application Data Definition
www.ucas.com/documents/external/progress/MISmanual_appendixC.xlsx

UCAS
Progress

1.0 INTRODUCTION TO UCAS PROGRESS SEARCH AND APPLY

1.1 What is Search and Apply?

UCAS Progress Search and Apply provides 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 the purpose of the import and export function?

The following information is provided to enable your provider to:

- download and import to your MIS the application data that learners have sent to you

- download and import from UCAS Progress to your MIS the updated status of your learners applications

- export from your MIS and upload to UCAS Progress Apply the updated status of your learner applications, for example, acknowledged, conditional offer, enrolment etc.

These guidelines will enable your provider to receive and manage applications through UCAS Progress and will also enable you to import them into your own management information system (MIS). There is then the ability to import the application data from your MIS back into UCAS Progress to enable UCAS Progress to update the young person on the status of their application.

UCAS Progress recommends that only one person at your provider undertakes the application download process. Where multiple Application Managers do perform the application download process we recommend that an internal log is retained. Please note that where multiple Application Managers exist at a provider they are only able to see applications that they have downloaded and not those downloaded by other colleagues at your institution. This practice is in place as some Application Managers operate between institutions and so have access to applications for more than one provider.

2.0 DOWNLOADING AND IMPORTING NEW LEARNER APPLICATIONS TO YOUR MIS

This process will enable you to download and import all new applications that have not already been exported by yourselves. Please note: this process is designed to only download and import new applications – it will automatically exclude any applications that have been previously downloaded by your provider - see Appendix A.

On the import/export page each Application Manager will be able to see a list of the downloads from the Apply system that they have previously carried out. Each Application Manager will be able to further download copies of this previously exported data if this is required. **Note**: *If for any reason a user needs to download again a full or up-to-date data set from the Apply system, users will need to also download again any 'updated learner application data – see '5.0 Importing updated learner applications into your MIS' below for details.)*

2.1 UCAS Progress Apply process:

a. Log into the UCAS Progress dashboard. (Log in details will be provided by a staff member at your provider who is registered as a UCAS Progress Apply User Manager.)

b. Select the 'Applications' tab on the dashboard.

c. Select 'Import/Export' from your provider's applications page. If you have access to more than one provider you will need to access this page by selecting the providers tab and then clicking the 'Applications' link against the relevant provider.

d. Select the 'Export new applications' button on the Import/Export page.

e. The process will take up to an hour to run. An email will be sent to you when the export is ready to download.

f. Select 'Download'.

g. The csv files can be downloaded through .zip extension.

2.2 Your MIS process:

a. Map .csv files into MIS fields - see Appendix A.

b. Import into your MIS. Note: You may need your MIS supplier to enable this functionality or you may need to import an intermediate database or interface.

2.3 Things to consider:

- The .csv files are delimited with '|' (vertical bar or pipe).

- UCAS Progress Application ID is used to map separate .csv files to the application.

- If you or another user at your provider has exported applications these are subsequently not identified as 'new' and so will not be downloaded.

- If there are no new applications then your files will be empty.

- Each Application Manager will only see in the list of exports that they have requested and not all requests made by providers. This is because users at the same provider can be associated to different areas therefore they may be able to see different applications.

3.0 IMPORTING UPDATED LEARNER APPLICATIONS DATA TO YOUR MIS

This process will enable you to export from UCAS Progress, the updated status of learner applications, for example, acknowledged, returned, offers, etc and import it into the existing learner application records within your MIS.

UCAS Progress will export data for all applications where the status of the application has been updated since the last export. As the application details will already be held in your own MIS, the data supplied in the updated applications export does not contain all application details - see Appendix B.

On the import/export page each user will be able to see a list of the downloads from Apply that have previously been carried out. Each user will be able to download further copies of previously exported data sets if required. Note: If for any reason a user needs to download again a full or up–to-date data set from UCAS Progress, users will also download again any 'new learner application data – see Appendix A.

**MIS learner application data
import and export manual**
Introduction to Search and Apply

**MIS learner application data
import and export manual**
Introduction to Search and Apply

3.1 UCAS Progress Apply process:

a. Log in to UCAS Progress (login details will be provided by a staff member at your provider who is a registered UCAS Progress Apply User Manager).

b. Select the 'Applications' tab on the dashboard.

c. Select 'Import/Export' from your provider's applications page. If you have access to more than one provider you will need to access this page by selecting the providers tab and then clicking the 'Applications' link against the relevant provider.

d. Select 'Export updated applications' button on the Import/Export page.

e. The process will take up to an hour to run. An email will be sent to you when the export is ready to download.

f. Select 'Download'.

g. A .csv file can be downloaded through a .zip extension.

3.2 Your MIS process:

a. Match your applicants in .csv file to applicant in MIS - see Appendix B: 'UpdatedApplicationDataDefinition.xlsx' data definitions.

b. You can now import the updated application status into your MIS.

3.3 Things to consider:

- The .csv file is delimited with '|' (vertical bar or pipe).

- The UCAS Progress Application ID is used to map .csv file to existing application in MIS.

4.0 EXPORTING UPDATED STATUSES FROM YOUR MIS TO UCAS PROGRESS APPLY

This process will enable you to import to UCAS Progress application data that has been updated in your own provider's MIS. Users are advised to carry out an 'Updated Learner Applications' import to your MIS prior to exporting your updated application statuses data. This will ensure that any changes to application statuses made by learners or administrators directly through UCAS Progress are updated in your MI system. (Please see Appendix C for data definitions for applications import. Note: the 'Original status' field refers to the status of an application as set by the last update of learner applications data from UCAS Progress.

4.1 Your MIS process:

a. Export application data from your own MIS.

b. Map your own statuses to UCAS Progress statuses - see Appendix C.

4.2 UCAS Progress Apply process:

a. Log into UCAS Progress Application Manager dashboard. (Login details will be provided by a staff member at your provider who is a registered UCAS Progress User Manager).

b. Select the 'Applications' tab on the dashboard.

c. Select 'Import/Export' from your provider's applications page. If you have access to more than one provider you will need to access this page by selecting the providers tab and then clicking the 'Applications' link against the relevant provider.

d. Select 'Import' on your provider's Import/Export page.

e. Browse and select .csv file.

f. Select 'Import' button.

g. The process will take up to an hour to run. An email will be sent to you when the import has been processed and will let you know whether it has been successful or not.

h. View import

- If successful, you will see an Import successful message

- If unsuccessful, you will see an import error message. You can then log into UCAS Progress to see by row the errors that have occurred during the import process.

4.3 Things to consider:

- We advise Application Managers to carry out an 'Updated Learner Applications' import into their MIS prior to exporting their updated application status data. This will ensure that any changes to application statuses made by learners or administrators directly on the Apply system are updated in your system. This application status is the data that is shown in the 'Original status' data field which you need to include in the export from your MIS. This is essential for cross referencing purposes. If the 'Original status' data on your MIS system does not match that held within UCAS Progress, you will not be able to import your updated status data to UCAS Progress.

- The .csv file is comma separated to make it simpler to save from an .xlsx file.

- UCAS Progress Application ID is used to map from existing application in your MIS back into UCAS Progress.

UCAS
Progress

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.

Follow us on Twitter
twitter.com/ucasprogress

Find us on Facebook
facebook.com/ucasprogress

UCAS Progress
08714 682 568
ucasprogress@ucas.ac.uk