Post-16 Courses Database: Quick guide for users new to providing data

1. Introduction

The Department for Education expects all post-16 education and training providers funded by the Education Funding Agency[1] (EFA) to supply information, by the end of September 2018, about the courses they plan to offer to 16-19 year olds in 2019/20. This guide provides a quick step-by-step overview of that process.

1.1. Who is this summary guide aimed at?

This quick guide is aimed at users providing their course data for the first time; EFA-funded post-16 education and training providers, and third-party organisations (such as multi-academy trusts) inputting course data on behalf of post-16 providers.

1.2. Sources of further information

If you encounter any problems or require more in-depth instruction on any aspect of data upload, please refer to the full help guide. You can also contact the support team at dfe.support@coursedirectoryproviderportal.org.uk or by phone on 0844 811 5028.

1.3. How can information be submitted?

A summary of the process to follow when submitting data is attached in Annex A.

2. Logging in

There are three main ways to submit data:

a) EFA-funded providers who have DfE Secure Access accounts can access the database by entering their username and password and selecting the 'Post-16 Course Portal' option.

If you have a Secure Access account but cannot see the Post-16 Portal option when you have logged in, this may have something to do with your account permissions. You will need to ask the Secure Access Approver within your provider to choose the Post-16 Portal in the Groups List section of your profile. If you are the Approver and you cannot see the Post-16 Portal application, please complete a Secure Access service request form.

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[1] This includes for example colleges, schools with sixth forms, academies with 16-19 provision, as well as charitable sector and commercial training providers, and local authority provision.

If you represent a new provider and have not yet set up your Secure Access account, you will need to complete a Secure Access service request form to initiate this process.

b) ESFA or EFA-funded providers who do not have a Secure Access account can submit course information direct to the Course Directory Provider Portal.

If you already have a Provider Portal account to upload post-19 course information (for example, if you offer both EFA and ESFA-funded programmes), you should continue to access and upload post-16 data using the same account.

If you do not have either a DfE Secure Access or a Course Directory Provider Portal account, you can email dfe.support@coursedirectoryproviderportal.org.uk and request an account to be set up.

c) Providers can nominate a third-party organisation to input course data on their behalf - more details are set out below.

3. Types of User

You will have been allocated a 'Superuser' account or a 'User' account – this will be visible in the top right-hand corner of the page once you have logged in. 'Superusers' can perform all the functions of data upload, amend the main provider details and create other users for their provider. 'Users' can make manual updates but cannot change the main provider details or create other users. If you want to change the Superuser for your provider, refer to the help guide.

3.1. Confirming provider details

A task Wizard will appear as soon as you log on so 'Superusers' can get access to the necessary screen by clicking 'Manage My Organisation, edit your provider details' If you don't want to use the Task Wizard or if you are not a 'Superuser' then close the Task Wizard. The Task Wizard will ask you if you would like to see it again next time you log in. Click Yes because you may find it useful for future tasks.

Main provider details

MANAGE MY ORGANISATION
Edit your provider details

The first page you will see in the Course Directory Provider Portal will be the Home Page:

This Page offers you a snap shot of the quality of information you update on the portal but as a new user this will yet to be properly populated. Once you start adding courses and opportunities if your press 'update quality scoring' the page will refresh and you will be able to see how good that data you have input is and you will be able to click on 'help' or 'How to improve your data quality' for top tips on how to improve in each area.

You can use the tabs at the top to navigate your way around the portal

As a new user, the first task will be to check your provider details are correct. To do this, click on 'Provider Details' (or 'Organisation Details') on the Navigation bar in the Home Page and check that the fields with pre-populated details are correct:

Fields can be amended by overtyping the text or using the drop-down menus. If the provider details need updating, most fields can be amended only by a 'Superuser'. The exceptions are:

- The UK Provider Reference Number (UKPRN) is a read-only field. If you feel this is incorrect or you need to change any of the details pre-populated from the UK Register of Learning Providers (UKRLP) please contact the UKRLP service desk at helpdesk@ukrlp.co.uk.
- If you think any of the following fields should be amended, then please contact the support team at dfe.support@coursedirectoryproviderportal.org.uk or by phone on 0844 811 5028:
  - Provider Type
  - Secure Access ID
  - DfE Provider Type
  - DfE Provider Status
  - DfE Local Authority
  - DfE Region
  - DfE Establishment Type

4. Inputting data

There are two ways to provide course data, either manually course by course or via a bulk upload using a CSV file. The Task Wizard will appear first though so let's explore how this is used and then the user guide will go in to more detail about how you do the functions later.

4.1. Managing your Courses using the Task Wizard

If you would like to add new Courses you have on the Portal, click the 'Manage Courses' button:

Courses

Only complete this if you have an ESFA contract to deliver FE or post-16 courses.

<table>
<tr>
<td>📖 MANAGE COURSES
Add or edit courses and opportunities</td>
<td>🏢 VENUE INFORMATION
Add or edit venues where you deliver courses</td>
</tr>
</table>

This will then take you to the following page:

How would you like to enter the course information?   ✕ close

<table>
<tr>
<td>ADD COURSE
Manually add a new course</td>
<td>UPLOAD COURSES
Bulk upload multiple courses</td>
</tr>
<tr>
<td>VIEW COURSES
View and edit your existing courses</td>
<td></td>
</tr>
</table>

< back to previous screen

4.1.1. Add Course

If you would like to add an individual course or small number of courses manually, click the 'Add Course' button. For specific and exact instructions on how to do the function please see later in the document.

4.1.2. Upload Courses

If you would like to add multiple Courses through a bulk upload function, click the 'Upload Courses' button. This will then take you to the following page:

Bulk Upload Course Data

Bulk upload allows you to upload all your provision in a single file. If you've not bulk uploaded before, please click here to read the detailed instructions.

The table below has a summary of your current provision.

Offered for	Courses	Opportunities
Gail Test Provider	70	70
		Download Current Provision as CSV Warning: The following will NOT be included in the downloaded csv file: 1. Any courses/venues/opportunities with a validationStage of 'Archived' or 'Pending'. 2. Any invalid courses/opportunities which you uploaded are not published on the site. These will be lost if you then Bulk Upload the file.

Upload a new file

Click Browse and select your bulk upload file. Click upload.

[Choose file] No file chosen

☐ I understand this replaces all existing data for each group of courses offered by a single organisation/provider.

[Upload]

To learn how to do Bulk Uploads please see 4.3 Bulk Uploads in this document.

4.1.3. View Courses

Once you have added the courses you can see them listed by clicking the 'view courses' button.

4.1.4. Venue Information

To add Venues on the Portal, click the 'Venue Information' button.

Courses

Only complete this if you have an ESFA contract to deliver FE or post-16 courses.

MANAGE COURSES	VENUE INFORMATION
Add or edit courses and opportunities	Add or edit venues where you deliver courses

It will then take you to the following screen:

✕ close

How would you like to manage your course venues?

ADD VENUE	VIEW VENUES
Add a new course venue	View and edit your existing course venues

< back to previous screen

4.1.5. Add Venue

If you would like to add a new Venue to the Portal to link with your Courses, click the 'Add Venue' button.

4.1.6. View Venues

Once you have added Venues you can view them from this section by clicking the 'View Venues' button.

4.2. Manual input

Now we have explored the Task Wizard to be used as short cuts to perform certain actions the below will explain how to perform each task in more detail. To manually add your courses as a minimum, all mandatory fields will have to be completed. These are the fields with a red asterisk next to them.

When updating manually, you will receive pop-up messages warning you about certain rules. To view these messages please disable your pop-up blocker.

4.2.1. Adding a new venue

To input new venue details, select the 'Add a new venue' tab on the navigation bar and type the required information into the relevant fields. To update the information already held about where your course opportunities are held, select the 'Venue' tab on the navigation bar and edit the information required.

| Last activity: Never | Traffic light status: ● Red | Data quality score: ● Poor (0%) | DfE |

Education & Skills Funding Agency

☑ Task Wizard

Home   Provider Details   Venues ▾   Apprenticeships ▾   Courses ▾   Bulk Upload ▾   Manage Users ▾   Reports ▾   Organisations ▾   Help

Add New Venue

Fields marked * are required.

Provider Venue Id ❷	
Venue Name * ❷	
Address line 1 * ❷	
Address line 2	
Town *	
County	
Post code *	Find Address

4.2.2. Amending a new venue

To amend a venue, you can either select the 'View all venues' on the Navigation bar and edit or click on the 'Venue view/amend' link on the Home Page. Once the venue form opens make all necessary changes and click the 'Save' button.

4.2.3. Adding a new course

To input new course details, select 'Add a new Course' from the drop-down menu under 'Courses' on the Navigation bar. A pop-up message will appear asking "Does your course have a Learning Aim Reference?". If you confirm your course has a Learning Aim Reference

(this is sometimes referred to as the QAN), once you input the reference number and it is recognised, most of the mandatory fields will be pre-populated. If your form does not have a Learning Aim reference, or QAN, then you will need to complete the course title and qualification type as a minimum.

4.2.4. Additional / non-mandatory information

We strongly recommend you complete the rest of the form as you will increase your chances to appeal to potential students. Once you have filled in all data, please click on the 'Create and Add Opportunity' button and you will be taken to the opportunity page.

4.2.5. Adding a new opportunity

Opportunities are the delivery methods for the course. Again, as a minimum, you will need to input the mandatory information but the more fields you can complete the more informed the student will be when making choices.

To save the course details click on the 'Save' button.

4.2.6. Amending a course and/or opportunity

To amend a course or opportunity you can either select the 'View all courses' on the Navigation bar and edit or click on the 'course view/amend' link on the Home Page. Once the courses form opens make all necessary changes and click the 'Save' button.

4.2.7. Advance start dates

There is now the option to advance multiple start dates for courses. Click on Courses then View all opportunities
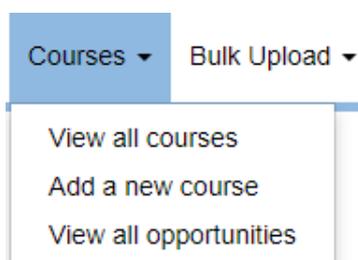
At the side of each course there is a tick box

Tick each of the courses that you wish to advance start dates then click Advance Selected

Within this pop up you can advance the course start date

Advance Start Dates   ✕

Advance Start Date for 3 opportunties.

Fields marked * are required.

New start date * ❓ | dd/mm/yyyy |

New end date * ❓ | dd/mm/yyyy |

Create or Update? * | Create new opportunity ▾ |

[Continue] [Cancel]

If you are updating existing opportunities, choose 'update existing opportunity.

4.3.   Bulk Upload

Bulk upload allows you to update your entire provision in a single file. A bulk upload overwrites the entire current provision for your provider(s), unless you are a third party organisation uploading only on behalf of a provider. Below is a summary of the steps to take to bulk upload data, but we strongly advise you to read the bulk upload section in the full help guide before attempting to upload data in this way.

4.3.1. Preparing the data

- The bulk upload information must comply with the data standards. Please have a look at this document before you attempt a bulk upload.
- The maximum file size you can upload is 3 megabytes.
- Bulk upload files are in Comma Separated Values (CSV) format with a defined column and section order. Any text with commas in it needs to be put in double quotes. To ensure compatibility please make sure you are using the latest CSV template available. The CSV template can be downloaded from the Latest Bulk Upload Template and beginner information section of the help documents on the Provider Portal.
- Your file must have four sections in the order: Provider; Venues; Courses; Opportunities.
- Bulk upload files can be prepared manually, using a spreadsheet program such as Excel, or automatically from your own course management system if it has a suitable facility to export data.
- For certain fields when using bulk upload, you will need to use the codes provided in Appendix B of the help guide.

4.3.2. Saving and uploading your file

- Once you have arranged your data and saved the file in CSV format, select 'Upload a file' from the drop down menu on the 'Bulk Upload' tab. Click on the 'Browse/Choose file' button, select the file you want to upload and click 'Open'. Ensure you check the tick box to agree for the new file information to replace the existing data and click on the 'Upload' button.

4.3.3. Validation

- The file goes through various validation stages. If the file fails during any stage the entire file will be rejected and no data will be published. You should receive an automated email to inform you of this; the errors will be reported on the Provider Portal, broken down into Provider, Venue, Course and Opportunity errors and, where possible, a line number is given. The errors will need to be rectified, or you will be asked to confirm that you are happy to publish only the valid opportunities and discard the invalid ones.

5. Adding organisations to input data on behalf of a provider

Although the responsibility to submit course information rests with the EFA-funded post-16 provider, organisations such as local authorities, multi-academy trusts or portal providers can be nominated by providers to submit information on their behalf. If a provider is nominating a third party organisation to do this, then this organisation needs to be added onto the system unless it is already.

A provider can create an account for a third party organisation by selecting 'Add a new Organisation' on the drop down menu on the 'Organisations' tab and completing the required information in the relevant fields.

Once completed, please click on the 'Create' button at the bottom of the page to submit the organisation's details. Providers will be prompted to provide details of the organisation's 'Superuser'. Once the Organisation 'Superuser' has been entered, they will be emailed a link to complete setting up their account.

6. Uploading course information on behalf of a provider

If you are a third party organisation that plans to upload course information on behalf of one or more providers, the following steps detail the process to follow:

- If a provider has nominated you to upload their course information (process detailed above in step 5), you should receive an email inviting you to set up an Organisation account on the Provider Portal. Your account will then be linked to the provider(s) you will be uploading information on behalf of.

- Alternatively, the DfE Support team can set up an Organisation account on your behalf and you will then be able to proactively nominate the provider(s) you wish to provide course information for. The provider(s) will receive an email asking them to confirm they are happy for you to upload their course information. You can contact the support team at dfe.support@coursedirectoryproviderportal.org.uk or by phone on 0844 811 5028.

Home   Organisation Details   Bulk Upload ▾   Manage Users ▾   Reports ▾

Providers Associated with or Invited to Join Your Organisation

Copy | CSV | Excel | Print | Show / hide columns

10 ▾ records per page   Search: [Search]

UKPRN	Provider Name	Primary Contacts	Status	Actions
			Accepted	View | Remove
			Accepted	View | Remove
			Accepted	View | Remove
UKPRN	Provider Name	Primary Contacts	Status	Actions

Showing 1 to 3 of 3 entries

First | Previous | 1 | Next | Last

Invite a Provider to Be a Member of Your Organisation

Fields marked * are required.

Provider name [   ]

[Invite]

[Add a new provider]

Identical to the process for providers, organisations can upload information either manually or via a bulk upload. Please note, however: if you are a third party organisation uploading on behalf of a provider, you need to use a different bulk upload template than if you are uploading as an individual provider. This can be found on the Latest Bulk Upload Template and beginner information page under the title 'Organisations'.

7. What happens to the information that is submitted?

Once the course information has been provided it will be made available overnight on the Course Directory Provider Portal, the National Careers Service Course Directory and via the API on data.gov.uk (please note: CSV files will be uploaded here on a monthly basis.)

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Annex A: Summary of the process to follow when submitting data

Decide who will be submitting course data for your institution(s)

You	A nominated individual within your institution	Someone linked to your institution e.g. an employee at your LA or your multi-academy trust	Another third party e.g. portal provider

Does this person have existing log-on details?

Logging on

YES – for DfE Secure Access (used by schools) Access the national courses database via the DfE Secure Access website; enter username and password and select the 'Post-16 Portal' option	YES – for the National Careers Service Course Directory Provider Portal (particularly used by ESFA-funded providers) Access the National Careers Service Course Directory Provider Portal (including if you work at an institution which offers both ESFA-funded and EFA-funded courses); enter username and password to log on	NO - Email dfe.support@coursedirectoryproviderportal.org.uk and request for an account to be set up

On first log-in, check your provider details are correct

Uploading/Updating data

Manual Update If manually uploading or updating course data, this can be done following the guidance here	Bulk Upload If uploading or updating data by bulk upload, this can be done by following the guidance here

What happens to the data?

Courses can be searched on the National Careers Service Course Directory, posted on the Course Directory Provider Portal, or on data.gov.uk (available as open data to be utilised by third party websites)