

Skills Funding Agency

Provider Data Self-Assessment Toolkit (PDSAT)

v17 User Guide





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Introduction

Provider DSAT (PDSAT) is a tool for further education and training providers (colleges, training providers and employers) to output a series of reports to test the integrity of their Individualised Learner Record (ILR) data. This will assist providers in carrying out their routine data cleansing and submitting accurate ILR data returns to the funding agencies.

PDSAT version 17 has been developed as a standalone application this year which no longer requires Microsoft Access to be installed on a users' machine. This has allowed for PDSAT to become a more efficient application in some of the following ways:

- Process speed for loading returns has increased
- Downloads of new versions of PDSAT will occur automatically
- No need to close Excel whilst running reports

Compatibility and prerequisites

PDSAT has been designed to run on the Windows operating system, and is compatible with the following operating systems:

- Windows Vista
- Windows 7
- Windows 8
- Windows 10

Note we do not support installation of PDSAT on a server or similar client.

In addition, you will need the following prerequisites in order for PDSAT to run:

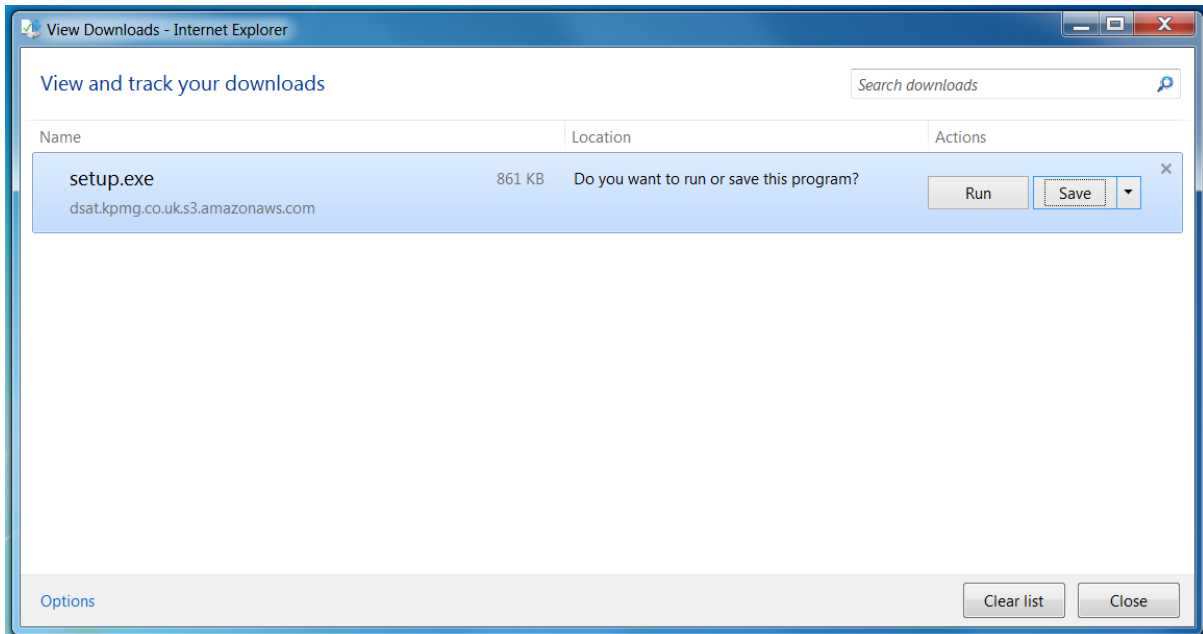
- An internet connection, in order to download and update PDSAT
- Microsoft .NET framework 4.5 (It is likely that .NET Framework 4.5 is already installed on most Windows machines)
- Microsoft SQL Server 2012 Express LocalDB

If your machine does not have these prerequisites, they will automatically download when you install PDSAT. However, download of the prerequisites will require **administrator rights**.

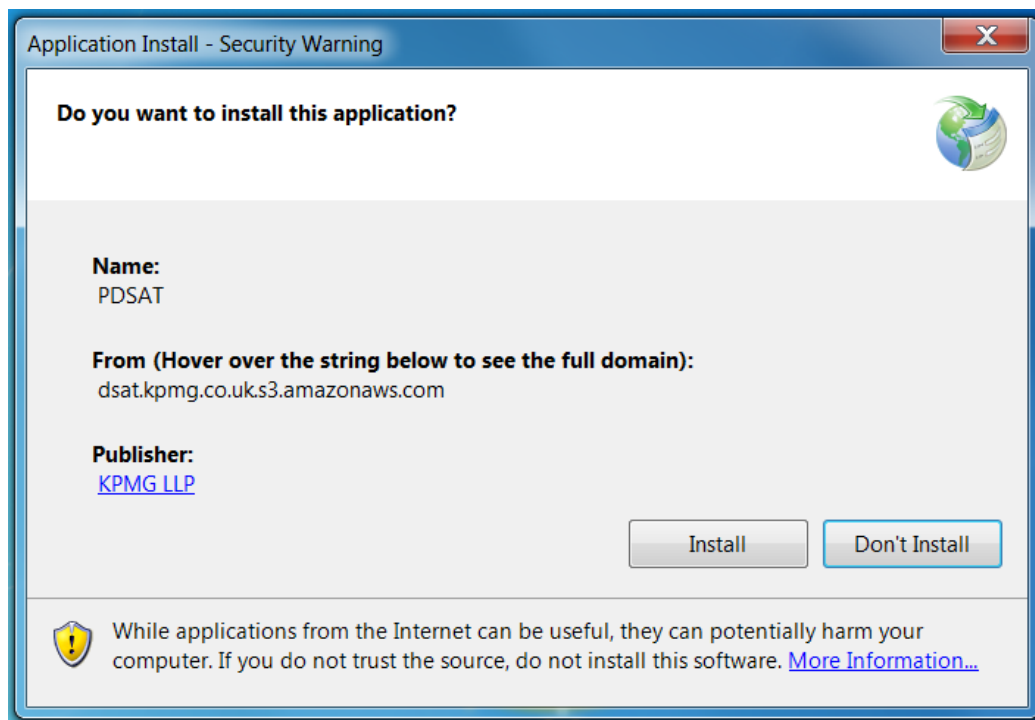


1. Installing PDSAT

To download PDSAT, select the link under “PDSAT version 17”, on the SFA website. This will begin the download process and a message box will ask whether you wish to run or save. Select “Run” to begin the download.

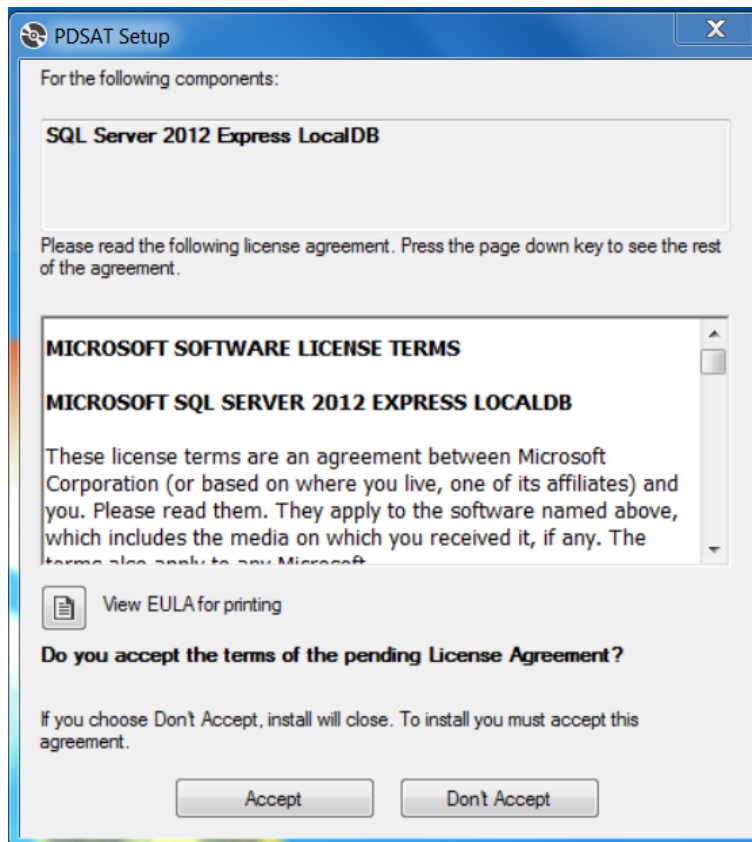


The following box will appear. If you are required to download any of the prerequisites detailed in “Compatibility and Prerequisites”, and **do not have administrator rights**, you will need some with administrator rights to allow the install to take place. Usually this will be someone in your IT department. Once administrator rights have been granted, select “Install” to continue.

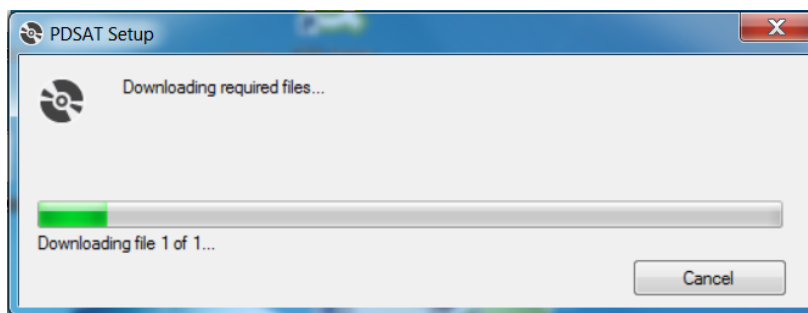




If you are required to download any of the prerequisites, the following box will appear. This example shows that Microsoft SQL Server 2012 Express LocalDB is not currently installed.



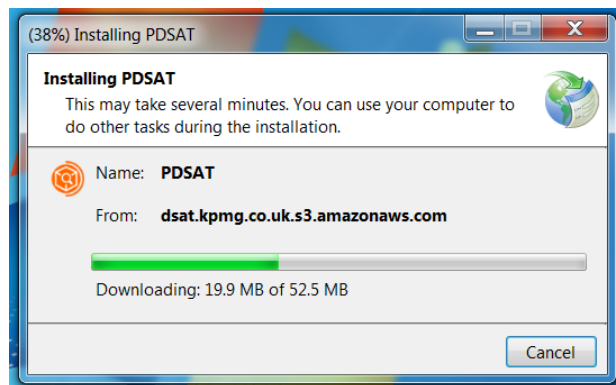
Select "Accept", and the prerequisite will begin its download and a progress bar show. An administrator may again be required to allow the download to continue.



After the prerequisite(s) are downloaded, you will be returned to the initial install screen. Select "Install" to start the main download of PDSAT. This will usually take in the region of thirty seconds to two minutes, with the progress being tracked by the green bar.



Skills Funding Agency Provider Data Self-Assessment Toolkit (PDSAT)



As soon as the install is complete, PDSAT will automatically begin to open. In addition, a PDSAT icon will appear on your desktop, as well as appearing in your program listings. You can select either of these to open PDSAT in the future.



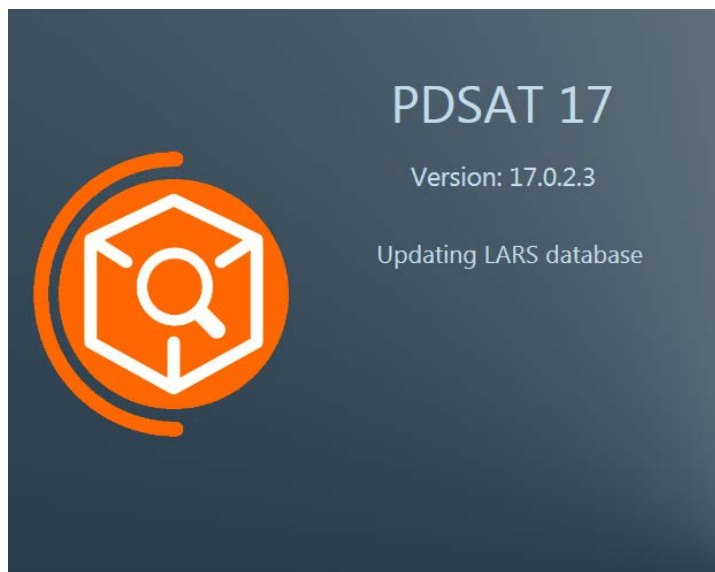
2. Opening PDSAT

2.1 Opening Screen

When you open PDSAT, the following opening screen will be seen. This opening screen details the following information:

- Application name: PDSAT 17
- The current version you have downloaded, i.e. Version: 17.X.X.X
- A message indicating the progress of the set up

When PDSAT is installing for the first time, it will perform its initial setup, which will take a few minutes. The various steps of this initial setup will be detailed as messages on this opening screen.



2.2 Updates

If there is an update available, such as an update to the LARS database, the update will automatically download, providing there is an internet connection. The opening screen will show that an update is taking place and will detail the version that is being downloaded. In addition, the progress of the download will be shown on this screen. Once the update has completed, PDSAT will automatically restart and the version number will have changed to the latest version number. This indicates that the update has successfully taken place and PDSAT will then continue to open.

2.3 Disclaimer

As soon as PDSAT is set up, the disclaimer will appear. In order to continue, read the disclaimer and if you agree, select "Accept". Selecting "Decline" will close PDSAT.

If you do not want the disclaimer to appear when you open PDSAT in the future, select the tick box as shown below. This will suppress the disclaimer message on future sessions. Please note, whenever an update is downloaded, the disclaimer will appear on start-up and you will need to select the tick box again to suppress the disclaimer for future sessions.



Disclaimer

Providers are responsible for implementing adequate and effective controls surrounding the submission of funding claim(s) to the Agencies.

The Provider DSATs are a suite of exception reports highlighting potential data anomalies in certain areas which may require further investigation. Provider DSATs should not be solely relied upon to identify all irregularities that may exist.

Providers are also reminded that the Agencies' contractual requirements include significant other areas not covered by Provider DSATs.

Please press accept to agree to the above conditions.

Accept

Decline

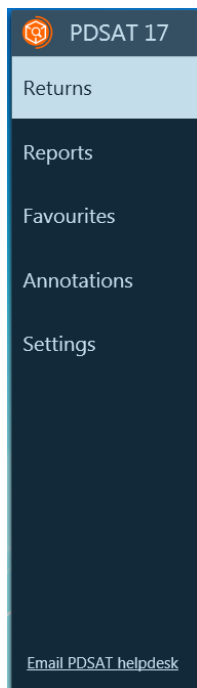
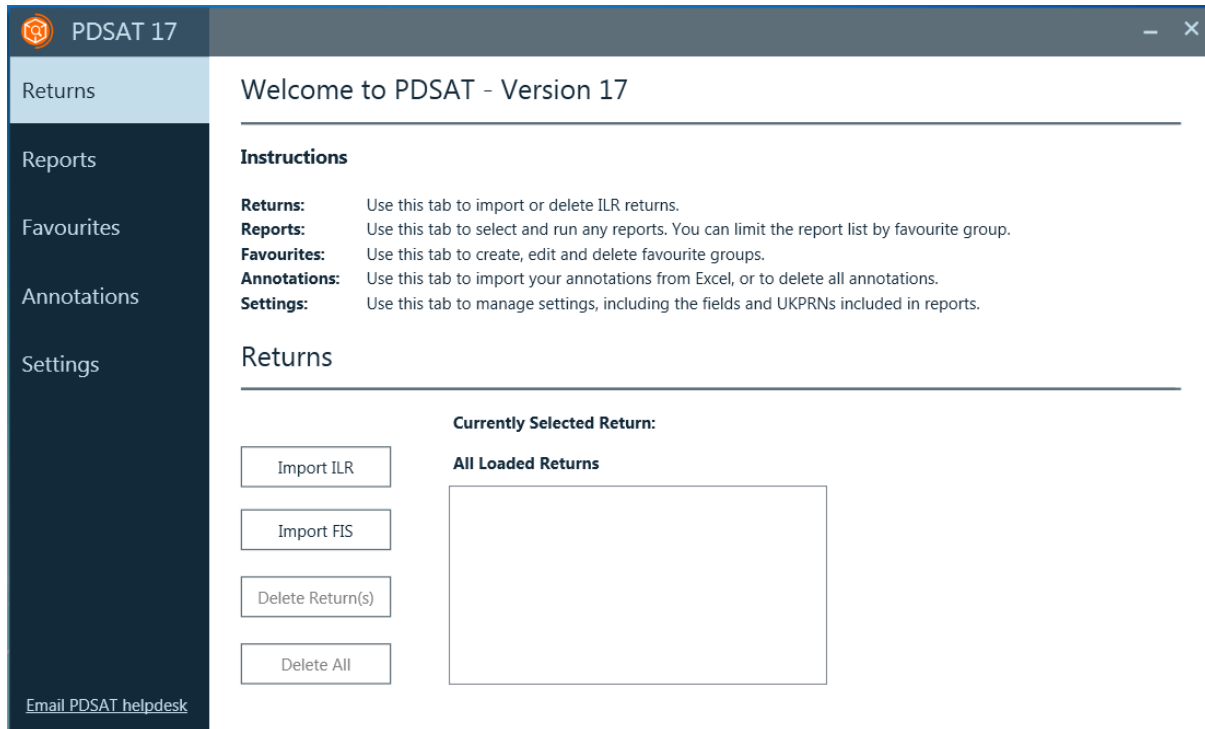


Please tick the box to suppress this message on start up



3. PDSAT Overview

Once you have accepted the disclaimer, PDSAT will open to the following screen. Version 17 has quite a different look compared to previous versions of PDSAT, however the core functionality and layout remains much the same.



3.1 Sidebar

In order to navigate throughout PDSAT, there is a sidebar on the far left, containing a series of buttons.

The sidebar indicates the currently selected page by highlighting the currently selected button in light blue.

To move to a different tab, hover over the button for the page you wish to go to and left click to select. When you hover over a page name, the button goes to a dark blue.

The button at the bottom of the sidebar allows you to contact the PDSAT helpdesk with issues relating to PDSAT. This will be explained further in the [PDSAT support section](#).



3.2 Top Bar

The grey top bar allows you to move the PDSAT window around. Click within the grey portion of the top bar and drag to move PDSAT where you want on your screen.

There is a minimise button, symbolised by the “-”, to collapse the window out of sight. To restore PDSAT into view, click on the PDSAT icon in your Windows taskbar.

Finally there is an exit button, symbolised by the “X”. Pressing this will close PDSAT.





4. Returns

The returns tab is the first page you will see of the main PDSAT application and is split into two main parts:

Instructions

The instructions section provides a brief summary of how to use each of the tabs in PDSAT.

Returns

This section gives you the ability to import ILR XML files and import from FIS into PDSAT. It contains four buttons:

- Import ILR
- Import FIS
- Delete Return(s)
- Delete All

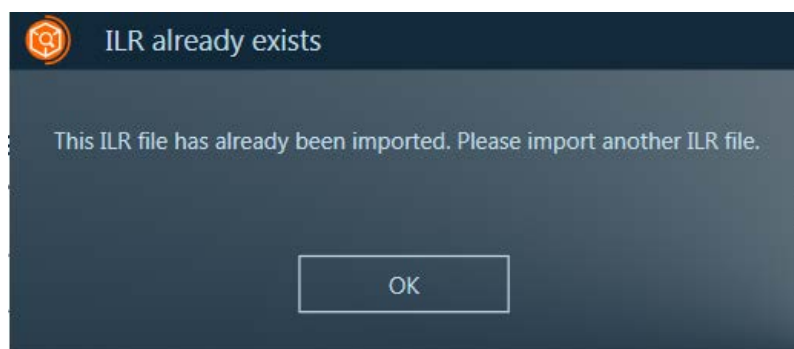
While there are no returns loaded, the Delete Return(s) and Delete All buttons are disabled.

The section also contains a selection box with the heading "All loaded returns", where any loaded returns will be displayed. In addition, the currently selected return will be displayed to the right of the heading, "Currently selected return".

4.1a Loading returns - ILR

Version 17 is only able to load 2016/17 ILR XML files. In order to load an ILR XML file, follow these steps:

- Select the "Import ILR" button under the "Returns" heading. This will open a window which will allow you to navigate to the directory where your ILR XML files are stored. Only 2016-17 ILR XML files will be able to be selected.
- Once you have selected the file, the import process will begin and a loading screen will appear. The loading screen will display information messages about the import process.
- If the file you have selected is already loaded into PDSAT, the following message will display:



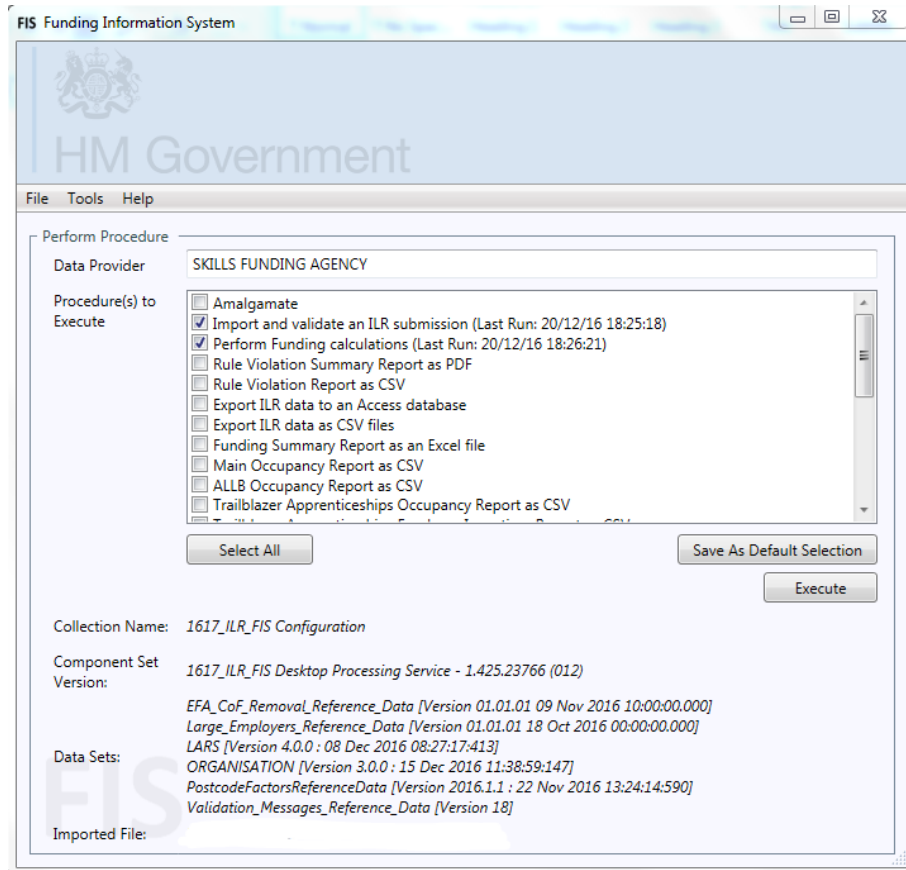
- Once the file has imported into PDSAT, you will be notified with a success message. The loaded return will appear in the "All loaded returns" box at the bottom of the page as well as besides the heading, "Currently selected return". The provider name will also appear in the top right hand corner.



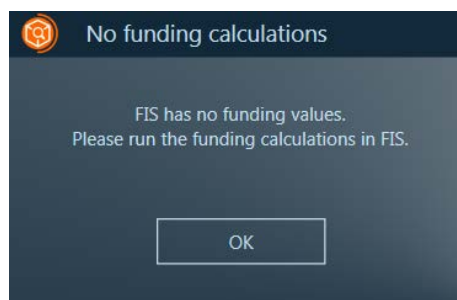
4.1b Loading returns – FIS

Version 17 now allows you to import from the Funding Information System (FIS) directly, without the need to export an MS Access file from the FIS. In order to import from FIS, follow this steps:

- Load the ILR you wish to run the PDSAT reports on into FIS and run the funding calculations, picking the following two options:



Note, that in order for PDSAT to run the exception reports for a FIS return, the funding calculations need to have been run. If you have not run the funding calculations, the following message will show.



- Select the "Import FIS" button. This will allow PDSAT to connect to the FIS database and will extract the data **from the last ILR you loaded into the FIS.**

Note, only the last ILR that was loaded into FIS will be imported into PDSAT. This is because the FIS database only stores data from one ILR at a time.



- If the FIS return is already loaded into PDSAT, a message will display that indicates the return is already loaded – similar to that of an ILR already existing in PDSAT.
- A success message will indicate that the FIS data has been successfully imported. PDSAT will create a FIS return with a name that corresponds to the ILR you loaded into the FIS.

For example, for the ILR, “**ILR-12345678-1617-20170101-120000-01**”, the corresponding FIS return will show as “**FIS-12345678-1617-20170101-120000**”.

The return will appear in the “All loaded returns” box at the bottom of the page as well as besides the heading, “Currently selected return”. The provider name will also appear in the top right hand corner.

The connection to the FIS from PDSAT can be specified using the FIS Settings in the settings tab. Information on how to use these settings is detailed in the [section 9.1 – FIS Settings](#), in this user guide.

4.2 Changing returns

Every loaded return will appear in the “All loaded returns” selection box which is adjacent to the delete buttons – this is shown below. The currently selected return is highlighted within this box, as well as being displayed adjacent to the heading “Currently selected return”.

In order to change the currently selected return, select the desired return in the selection box. You will see that the return name next to “Currently selected return” will change to the one you have just selected. If the return is for a different provider, the provider name will also change.

Returns

Currently Selected Return: ILR-99999999-1617-20160305-150842-01

All Loaded Returns

ILR-77777777-1617-20160301-105929-01
ILR-99999999-1617-20160305-150842-01

Buttons: Import ILR, Import FIS, Delete Return(s), Delete All

Returns

Currently Selected Return: ILR-77777777-1617-20160301-105929-01

All Loaded Returns

ILR-77777777-1617-20160301-105929-01
ILR-99999999-1617-20160305-150842-01

Buttons: Import ILR, Import FIS, Delete Return(s), Delete All



4.3 Deleting returns

Once a return is loaded, the delete buttons become enabled. One or many returns can be deleted at a time. This can be done by the following:

Deleting all returns

Select the "Delete All" button to clear all returns currently loaded into PDSAT.

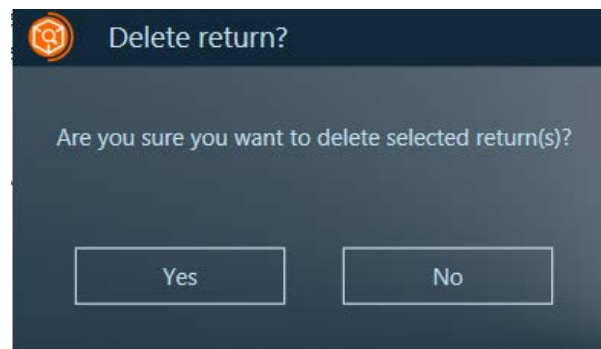
Deleting a single return

Select a single return in the selection box and press the button "Delete Return(s)".

Deleting a selection of returns

Hold the shift key and select the returns in the selection box that you wish to delete. Once you have made your selection, press the "Delete Return(s)" button.

When you press either the "Delete All" or "Delete Return(s)" button, a message box will appear which will ask you whether you are sure you want to delete the returns. If you have pressed the delete button by mistake, select "No", and you will be returned to the Returns tab. If you wish to continue with the deletion, select "Yes".





5. Reports

To navigate to the reports tab, select the button titled "Reports" in the side bar. The page you will see will look like this.

The screenshot shows the PDSAT 17 interface for an 'EXAMPLE PROVIDER'. The 'Reports' tab is selected in the sidebar. The main area contains two dropdown menus: 'Current Return' (set to ILR-7777777-1617-20160301-105929-01) and 'Favourites Group' (set to None), along with a 'Run Reports' button. Below these is a table of reports with columns for 'Report ID', 'Report Name', and 'Record Count'.

<input type="checkbox"/>	Report ID	Report Name	Record Count
<input type="checkbox"/>	17B-001	Report logic by report	70
<input type="checkbox"/>	17B-002	Possible duplicate learners	2
<input type="checkbox"/>	17B-003	Possible duplicate or overlapping learning aims	12
<input type="checkbox"/>	17S-101	All adult skills funding model learners and learning aims	5,863
<input type="checkbox"/>	17S-102	All apprenticeship standards learners and learning aims	0
<input type="checkbox"/>	17S-103	Learners enrolled on English and maths learning aims	1,489
<input type="checkbox"/>	17S-104	Learning support funding	0
<input type="checkbox"/>	17S-105	Learning aims by delivery postcode	1,492
<input type="checkbox"/>	17S-106	Funding by subcontractor	29
<input type="checkbox"/>	17S-107	All Advanced Learner Loan and Loans Bursary Fund learners	76
<input type="checkbox"/>	17S-201	19+ apprentices with full funding claimed	1
<input type="checkbox"/>	17S-202	19+ apprentices with enhanced or extended funding	0
<input type="checkbox"/>	17S-203	16 to 18 apprenticeships minimum duration exceptions	3
<input type="checkbox"/>	17S-204	19+ apprenticeships minimum duration exceptions	58
<input type="checkbox"/>	17S-205	Apprentices and trainees with co-funding	18
<input type="checkbox"/>	17S-206	Employment status exceptions	24
<input type="checkbox"/>	17S-207	Withdrawals with no refunds	0
<input type="checkbox"/>	17S-208	Apprentices that commence a standard after a framework	0

You can see the page has four main components:

Current Return dropdown menu

A drop down menu which shows you all the returns you have currently loaded. The return that is shown when the menu is closed, is the one that is currently selected. (By default, this is the last return you loaded into PDSAT on the returns page).

Favourites Group dropdown menu

A drop down menu which shows you your current favourite groups. Favourites will be further explained in the [Favourites section](#).

Run Reports button

Selecting this button will run your reports selection out to either the PDSAT reports viewer or an Excel workbook, depending on your current settings. If there are no returns loaded or reports selected, this button will be disabled, as you cannot run reports without a loaded return.

Reports grid

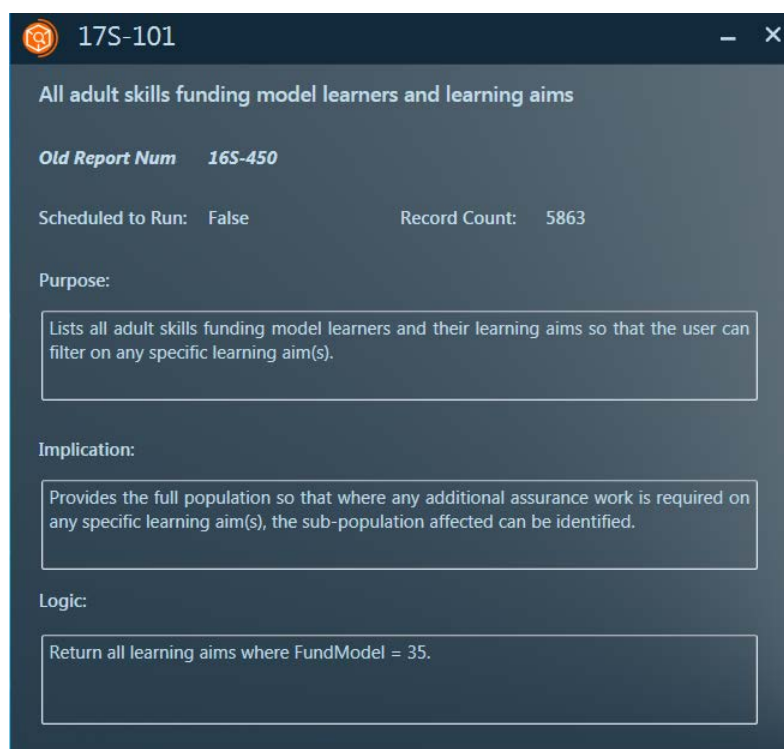


This is the main reports grid which shows all reports. In previous years, reports have been split into separate tabs for SFA, EFA and Both reports. In version 17, all reports for SFA, EFA and Both are displayed in the grid. The grid displays the following:

- A check box, allowing you to select the report to be run.
- Report ID, a unique short hand code for each report.
- Report Name, a short description of what the report does.
- Record Count, provides a count of the number of records that report will give. This record count will filter depending on whether any partner UKPRNs have been selected in the Settings tab.

5.1 Report Definition

In order to gain further information about a report before actually running it, select the Report ID of any of the reports to display a reports definition window. An example can be seen below.



The report definition window gives more detailed information about the report. In addition to the Report ID, Report Name and Record Count from the reports grid, it provides the following information:

- Old Report ID - giving the report ID from version 16 of PDSAT. If the report is new for version 17 of PDSAT, "NEW" will be displayed.
- Scheduled to Run – this will show true if you have ticked the check box to run the report, else false will be shown.
- Purpose – gives detail as to what the report will show.
- Logic – provides detail to the logic behind the report.
- Implication – what the results of this report will mean for you.

The reports window can be moved like the main PDSAT window, by selecting the top bar and dragging. Furthermore, it can be minimised and closed by using the "-" and "X" buttons respectively.



5.2 Selecting Reports

To create your selection of reports to run, you can do any of the following.

Select individual reports

Scroll through the reports grid and select any of the reports you wish to run by ticking the check box associated to that report.

The check box next to the selected report will turn orange with a white tick. In addition, the checkbox in the header of the grid will go orange, but will not show a white tick. This shows that some, but not all, of the reports have been selected.

Select all reports

To select all reports in the reports grid, select the checkbox in the header of the reports grid. This will turn this checkbox, and all checkboxes below, orange with a white tick. This shows that all reports are now selected to run.

Favourite Groups

If you do not want to see all SFA, EFA and Both reports, you can use the Favourites Group dropdown menu to filter your selection. The favourite group menu will provide the following defaults:

- None – No reports are selected to be run.
- SFA – Filters and selects only SFA reports, as well as the three Both reports.
- EFA – Filters and selects only EFA reports, as well as the three Both reports.
- All – Selects all reports, SFA, EFA and Both.
- Your favourite group – Any favourite groups you have created in the favourites tab will show in the dropdown menu. The reports will filter and select the reports you have added to your favourite group.

5.3 Running Reports

Exporting to the reports viewer

Once you have made your selection of reports, select the "Run Reports" button. By default, this will run your reports selection to a reports viewer, providing a fast means of viewing the reports and for quickly adding annotations. Details of how to use the reports viewer are in [section 6 – Reports Viewer](#), of this user guide.

To run the report selection directly out to Excel, you must change the report export setting in the Settings tab. This is detailed in [section 9 – Settings](#), of this user guide.

Exporting to Excel

If you have the export settings set to exporting to Excel, when you select the "Run Reports" button, a window will open where a default name for your report will be displayed. You can use this name for your report or you can type a name of your own choice for your report. In addition, you can select the directory for where the report will be saved.

Please note, you can set the report directory in the settings tab – this will be explained in the [section 9 – Settings](#).

To continue, select "OK", and the export to Excel will begin. A loading screen will appear, detailing which report is currently being exported.



Please note, if you have any very large record counts for a report i.e. around 10,000 records, you may experience performance issues whilst exporting to Excel.

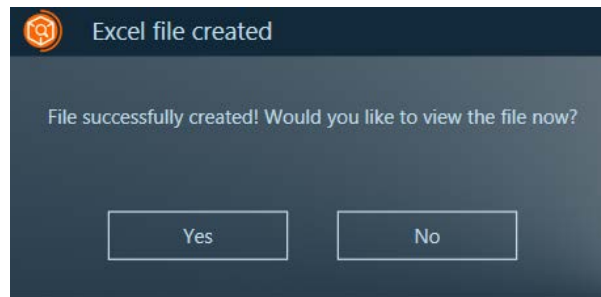
Other instances of Excel

Please note that in version 17 of PDSAT, you no longer need to close all instances of Excel whilst running your reports. PDSAT is able to export reports to Excel with multiple other instances of Excel still open.

Note, as per standard Excel functionality if a cell is being edited in another open instance of Excel, the reports will not run.

5.4 Viewing Reports in Excel

Once all the reports have been exported, you will see the following message box:



If you wish to view your reports now, select "Yes". If you select "No", you can view your reports any time by opening the Excel workbook, which has saved in the directory that you specified.

If you selected yes, the Excel workbook will automatically open up. The first page you will see will be a contents page, similar to below.

Report Number	Report Name	Record Count
17B-001	Report logic by report	70
17B-002	Possible duplicate learners	2
17B-003	Possible duplicate or overlapping learning aims	12
17S-101	All adult skills funding model learners and learning aims	5,863
17S-102	All apprenticeship standards learners and learning aims	6,421
17S-103	Learners enrolled on English and maths learning aims	1,489
17S-104	Learning support funding	2
17S-105	Learning aims by delivery postcode	1,492
17S-106	Funding by subcontractor	29
17S-107	All Advanced Learner Loan and Loans Bursary Fund learners	0
17S-201	19+ apprentices with full funding claimed	1
17S-202	19+ apprentices with enhanced or extended funding	0
17S-203	16 to 18 apprenticeships minimum duration exceptions	0
17S-204	19+ apprenticeships minimum duration exceptions	0
17S-205	Apprentices and trainees with co-funding	18
17S-206	Employment status exceptions	346



Contents Page

The contents page will display the following:

- Return name – the name of the return of which you have run reports for.
- Provider name – provider name for the corresponding return.
- Report ID – the unique shorthand identifier for the report.
- Report Name – the name for the report, also a hyperlink to the corresponding report.
- Record Count – the number of rows the report has taken.

You can navigate to any report in Excel workbook by selecting a report name in the contents page. Alternatively, you can select the report you wish to see by selecting the corresponding tab in Excel.

Once you have navigated to the report, you can return to the contents page by selecting the PDSAT icon in the top left hand corner of the report.

Reports Page

To view the report information, select the plus symbol adjacent to row 14. This will open out the group and display the report information. The information detailed will be the same as would be shown in the report definition window for that report.

There is the addition of a User Notes section, where users can add notes relating to that report, which will be saved when the Excel workbook is saved.

In addition to the report information, there is the following detail:

- Record Count
- Learner Count – the count of distinct learners for that report.
- Report run date – the date that report was run.

The main data for the report is laid in the same way as previous versions of PDSAT. The headers will always remain at the top of the screen whilst you scroll down to view the rest of the data.

To save any changes you have made to the report, use the normal Excel functionality of “save” and the report will be saved.



6. Reports Viewer

The reports viewer allows for a rapid means of viewing the reports and adding annotations. When you select “Run Reports” and the export settings are set to “Viewer selected”, the following viewer will be shown.

17S-101 All adult skills funding model learners and learning aims
Record Count: 794

Learner reference number	Unique learner number	Family name	Given names	Date of birth	Age at start of programme	Age at aim start	Prior attainment	Funding line
1033	1000000000	FamilyName	GivenNames	01/07/1986		29	99	AEB - Other
1033	1000000000	FamilyName	GivenNames	01/07/1986		29	99	AEB - Other
1038	1000000000	FamilyName	GivenNames	27/07/1971		43	3	AEB - Other
1054	1000000000	FamilyName	GivenNames	10/10/1987		28	9	AEB - Other
1059	1000000000	FamilyName	GivenNames	17/01/1986		29	99	AEB - Other
1067	1000000000	FamilyName	GivenNames	17/05/1990		25	2	AEB - Other
1071	1000000000	FamilyName	GivenNames	29/07/1965		50	1	AEB - Other
1105	1000000000	FamilyName	GivenNames	23/09/1982		33	9	AEB - Other
1107	1000000000	FamilyName	GivenNames	04/07/1982		33	9	AEB - Other
1137	1000000000	FamilyName	GivenNames	11/06/1986		29	1	AEB - Other
1138	1000000000	FamilyName	GivenNames	26/01/1960		55	98	AEB - Other
1140	1000000000	FamilyName	GivenNames	24/03/1976		39	99	AEB - Other
1152	1000000000	FamilyName	GivenNames	30/09/1970		45	1	AEB - Other
1153	1000000000	FamilyName	GivenNames	01/09/1978		37	99	AEB - Other
1168	1000000000	FamilyName	GivenNames	08/05/1995	20	20	2	19-23 Appre
1168	1000000000	FamilyName	GivenNames	08/05/1995	20	20	2	19-23 Appre
1168	1000000000	FamilyName	GivenNames	08/05/1995	20	20	2	19-23 Appre
1170	1000000000	FamilyName	GivenNames	15/11/1969		46	99	AEB - Other
1170	1000000000	FamilyName	GivenNames	15/11/1969		46	99	AEB - Other

The reports viewer is a separate window to PDSAT and is made up of the following components:

Main Window

The reports viewer has a similar top bar to that of other windows within PDSAT. The window has the same drag ability as the main PDSAT window. The window name is displayed in the top left hand corner. In addition to the “minimise” and “close” buttons in the top right hand corner, there is a full screen button, shown as two overlapping rectangles. This allows you to maximise the reports viewer to full screen.

In order to resize the window, go to the bottom right hand corner and a diagonal white double headed arrow will appear. Left click and drag the window to the size you wish.

There is a main title in the top left, which provides both the report ID and the report name. Below this is the record count for the report. This will change if you filter your selection and will indicate how many records remain after a filter is applied.

Data Grid

The data grid displays the report data in a similar manner to that of Excel. Headers are displayed at the top and are separated from the main data by a thicker grey line. You can scroll through the data both horizontally and vertically, using the corresponding scroll bars.



Filter buttons

Adjacent to each header there is a filter button:

When **unchecked**, the filter button is dark blue.



When **highlighted**, the filter button goes grey.



When **checked**, the filter button goes orange.



Selecting a filter will filter your data selection based on a value that you type in, further details are provided below.

Clear All Filters button

Selecting this button will clear any filters that have been applied to that report.

View Report Details

This will open up a window that is identical to that of the reports definition viewer, providing additional information about the report such as logic, implication, etc.

Previous Report button

Allows you to move to the previous report in your selection. This button will be disabled if there are no previous reports.

Next Report button

Allows you to move to the next report in your selection. This button will be disabled if there are no subsequent reports.

Reports list drop down

A drop down list of all the reports you have run out to the viewer. You can use this drop down menu to display the report of your choice without having to traverse forwards and backwards using the "Next Report" and "Previous Report" buttons.

Export to Excel button

This button is displayed as the green icon for Excel. When highlighted, it will go to a lighter green. If you select this button it will allow you to export the report you are current displaying. It works in the same way as if you selected the "Run Reports" button in the Reports tab and the export settings are set to "Excel selected". A window will appear with a suggested name for your file and you can then save the report to Excel.

If you wish to run your entire reports selection to Excel, please set the export setting in the Settings tab to "Excel selected" and follow the guidance in [section 5.3 – Running Reports](#), in this user guide.

Future updates to PDSAT will expand this functionality.



6.1 Applying Filters

To apply a filter, check the filter button adjacent to the field you wish to filter. A text box will appear below the heading name. Type into the text box the value which you wish to filter by.

This can be a part search, for example if you wanted to return all Funding lines which contain "Apprenticeship", type "apprenticeship" into the textbox and hit the enter/return key. All records that have a funding line that contain "apprenticeship" will be returned (Figure A).

If you want to do a more specific search, for example looking for only "24+ Apprenticeship", add "24+" to the start of the search to get only those records (Figure B).

You can apply multiple filters by selecting the filter button of another column. For example, we could search for all 24+ apprenticeship Funding lines AND where Prior attainment is 99 (Figure C).

Funding line
apprenticeship
19-23 Apprenticeship
19-23 Apprenticeship
19-23 Apprenticeship
24+ Apprenticeship
24+ Apprenticeship
24+ Apprenticeship
24+ Apprenticeship
24+ Apprenticeship
24+ Apprenticeship
24+ Apprenticeship
16-18 Apprenticeship

Figure A

Prior attainment	Funding line
24+ apprenticeship	24+ Apprenticeship
3	24+ Apprenticeship
3	24+ Apprenticeship
3	24+ Apprenticeship
3	24+ Apprenticeship
3	24+ Apprenticeship
3	24+ Apprenticeship
3	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship

Figure B

Prior attainment	Funding line
99	24+ apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship
99	24+ Apprenticeship

Figure C

To remove a filter, select the filter button of the filter which you wish to remove and the data grid will refresh accordingly to show records that apply to the resulting filter selection. If there are no filters showing in the end, then the data grid will show the original report data.

All filters can be removed by selecting the "Clear All Filters" Button.

6.2 Sorting Columns

In order to sort a column, select the centre of the header name and the column will sort into ascending order. If you wish to re-order a column to descending order, select the column heading name again.

6.3 Adding Annotations

The majority of reports will have a column on the far right of the report named "User annotations". This column allows you to add your own comments next to any of the records in your report. In the reports viewer, once you have typed in an annotation it will automatically be stored. All annotations will



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automatically be saved into PDSAT when you close the reports viewer and will appear in your report whenever you view the report again, either in the reports viewer or in Excel.



7. Favourites

To navigate to the favourites tab, select the button titled “Favourites” in the side bar. The page you will see will look like this:

<input type="checkbox"/>	Report ID	Report Name
<input type="checkbox"/>	17B-001	Report logic by report
<input type="checkbox"/>	17B-002	Possible duplicate learners
<input type="checkbox"/>	17B-003	Possible duplicate or overlapping learning aims
<input type="checkbox"/>	17S-101	All adult skills funding model learners and learning aims
<input type="checkbox"/>	17S-102	All apprenticeship standards learners and learning aims
<input type="checkbox"/>	17S-103	Learners enrolled on English and maths learning aims
<input type="checkbox"/>	17S-104	Learning support funding
<input type="checkbox"/>	17S-105	Learning aims by delivery postcode
<input type="checkbox"/>	17S-106	Funding by subcontractor
<input type="checkbox"/>	17S-107	All Advanced Learner Loan and Loans Bursary Fund learners
<input type="checkbox"/>	17S-201	19+ apprentices with full funding claimed
<input type="checkbox"/>	17S-202	19+ apprentices with enhanced or extended funding
<input type="checkbox"/>	17S-203	16 to 18 apprenticeships minimum duration exceptions
<input type="checkbox"/>	17S-204	19+ apprenticeships minimum duration exceptions
<input type="checkbox"/>	17S-205	Apprentices and trainees with co-funding
<input type="checkbox"/>	17S-206	Employment status exceptions
<input type="checkbox"/>	17S-207	Withdrawals with no refunds
<input type="checkbox"/>	17S-208	Apprentices that commence a standard after a framework

You can see the page is made up of the following components:

Favourites Group dropdown menu

This dropdown menu shows you all the favourite groups that currently exist, and will include any new groups that you have created. There are four default favourite groups:

- SFA
- EFA
- None
- All

You are unable to edit or delete any of the default favourite groups.

Save button

Saves any changes you have made to a favourite group that you have previously made. If one of your own favourites isn't selected, this button will be disabled – you cannot edit a default group.

Save As New button

Allows you to save a new favourite.

Delete Group button

Allows you to delete a group that you have made. If one of your own favourites isn't selected, this button will be disabled – you cannot delete a default group.



Refresh Group button

If you have made a change to a favourite group, but have not saved the favourite yet, you can refresh the favourite group to your original selection.

Favourite's grid

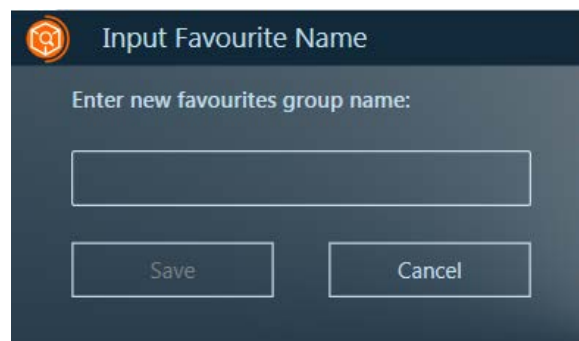
A grid very similar to that of the reports grid. The ticked checkboxes represent those that are selected for a favourite group. The grid displays the following:

- Checkbox
- Report ID
- Report Name

7.1 Creating Favourites

To create a favourite group, follow these steps:

- Use the checkboxes to select the reports that you want to add to your favourite group.
- Select the "Save As New" button to save your selection of reports as a favourite.
- A message box will appear asking you to give a name to your favourite group. An example is seen below. Type a name for your favourite group in the input box.



- Once you select "Save", a success message will appear, indicating the favourite has been successfully saved.
- You will now be able to see the name of your favourite group in your Favourite Group dropdown menu.

7.2 Editing Favourites

In order to edit a favourite group you have created, follow these steps:

- Select your favourite group in the Favourite Group dropdown menu.
- The reports in your favourite selection will be indicated in the favourite grid by the ticked checkboxes.
- To add more reports to the group, tick the corresponding check box for the report you wish to add. If you want to remove reports, un-tick the checkbox of a selected report.
- If you want to return your favourite group to how it originally was, select the "Refresh Group" button. Any checkboxes you have since un-ticked will become ticked and any checkboxes you have ticked will become un-ticked.
- To retain the changes you have made, press the "Save" button. A success message will appear to indicate the change has been made



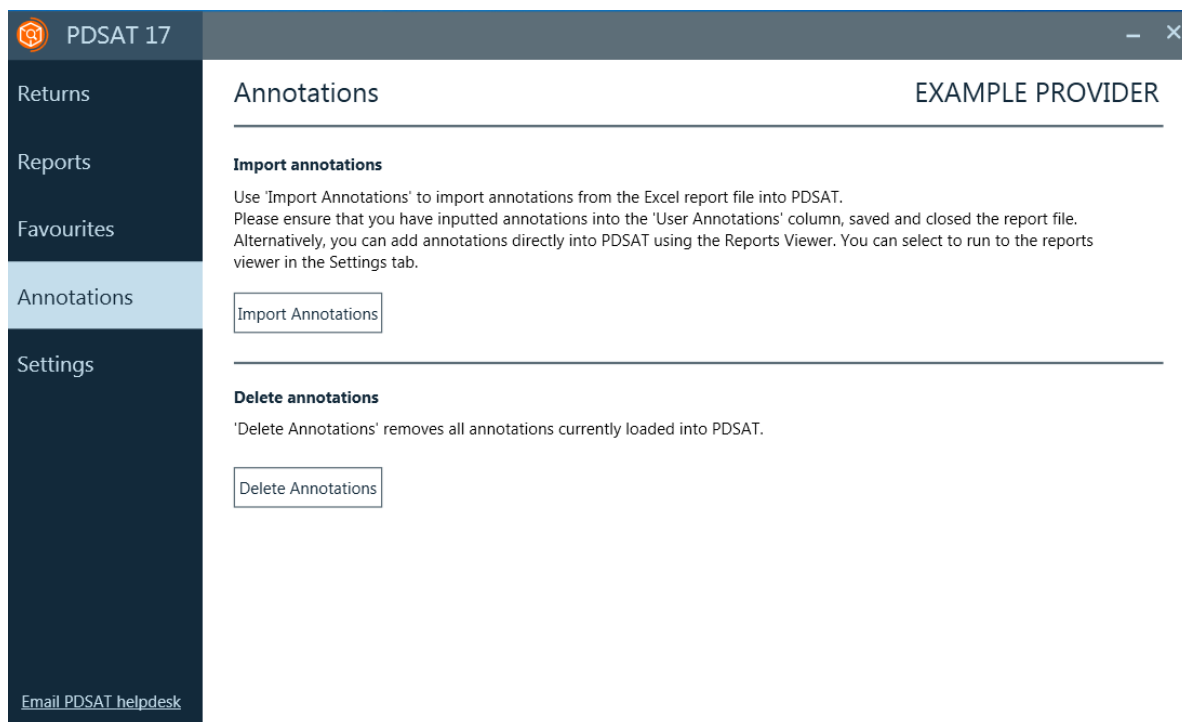
7.3 Deleting Favourites

To delete a non-default favourite group, select the group you wish to delete in the Favourite Group dropdown menu. Select the "Delete Group" button and the group will be removed from the list.



8. Annotations

To navigate to the annotations tab, select the button titled “Annotations” in the side bar. The page you will see will look like this:



The annotations tab is divided into two sections: Import annotations and Delete annotations.

8.1 Importing Annotations from Excel

This section provides some brief instructions on how to import your annotations from an Excel report you have added annotations to, annotations enter on the PDSAT Reports Viewer are automatically saved. The detailed steps are below:

- Add your annotations to the reports you wish in the “User annotations” column only, else they will not be recorded. The import process **is not** affected by the change of colour or font of the cells within the worksheet, however altering the main header section of the report **will** impact the import process and should therefore be avoided.
- Ensure that you have saved and completely closed the report you are going to import.
- Select the “Import Annotations” button and this will open a window which allows you to select the file you wish to import annotations from. You will only be allowed to select an .xlsb file to import.
- The import process will take place and you will be notified that the annotations have been imported via a success message. The annotations will be retained within PDSAT.
- Whenever you run a report for which you have imported annotations, these will be displayed in the “User annotations” column of your report.
- If you make changes to your annotations for a report and re-import that report, these will overwrite the annotations you previously had stored.

8.2 Deleting Annotations

By selecting the “Delete Annotations” button, you will clear **all** annotations you have added to PDSAT, for all your returns.



9. Settings

To navigate to the settings tab, select the button titled “Settings” in the side bar. The page you will see will look like this:

The settings page is made up of the following components:

Exclude reports with zero records toggle switch

In order to run a series of reports without including reports with zero records, you can turn this switch on.

When the switch is off, the colour of the switch is grey and the bold text next to the switch states “Included”. This indicates that when you export a report, reports with zero records will be **included**.

If you press the switch, it will turn orange and the bold text will read “Excluded”. When you run a series of reports now, any reports with zero records will be **excluded** from the report.

Export reports with Reduced Fields toggle switch

In order to run a series of reports with a reduced list of fields, you can turn on this switch.

When the switch is off, the colour of the switch is grey and the bold text next to the switch states “Full fields”. This indicates that when you export a report, the **full fields** list will be exported.

If you press the switch, it will turn orange and the bold text will read “Reduced Fields”. When you run a series of reports now, they will be run out with a **reduced fields** list.

Export reports to Reports Viewer toggle switch

In order to run a series of reports out to the reports viewer, you can turn on this switch. This switch is selected **on** by default.



When the switch is off, the colour of the switch is grey and the bold text next to the switch states "Excel selected". This indicates that when you export a report selection, they will be **exported to Excel**.

If you press the switch, it will turn orange and the bold text will read "Viewer Selected". When you run a series of reports now, they will be run out to the **Reports Viewer**.

Set Report Folder button

By selecting this button, you are able to set which folder you want any reports that you export to be saved. When you select the Run Reports button in the Reports tab, the folder you have set as your report folder will open up as the default area to save your reports.

Open Report Folder button

The Open Report Folder button will open up the folder that you have set as the destination for your reports. This allows you to easily find your reports. If you have not set a folder, your desktop will open as default.

Open Log Folder button

This button will open the folder where your log file resides. The log file details all the major steps of code that PDSAT has taken and will tell the PDSAT team where any issues have occurred within PDSAT. If you select "Email PDSAT helpdesk" and Microsoft Outlook is your default email provider, the log file will automatically attach to your email. However, if this is not the case, you can attach the log file from this location directly to your email.

FIS Settings button

This button opens up a window that allows you to set a series of options which allow you customise your connection to the FIS database. It follows a similar lay out to the settings panel in FIS which can be found under: *Tools -> Storage Settings*. **Further details of this process are covered below in section 9.1.**

Partner UKPRNs Filter grid

The Partner UKPRN grid allows you to select individual Partner UKPRNs to filter your reports by. Use the checkbox adjacent to the Partner UKPRN you want to filter by, or select the checkbox in the heading to select all. There are also some brief instructions on the settings page that give an overview as to how to use this feature.

Please note, you must have at least one partner UKPRN selected in the list else you will not be able to run reports. You will get the following warning message if no partner UKPRNs are selected:





Funding Period drop down

This drop down allows you to select the funding period for which you wish your FIS reports to show the funding for. The funding period selected will give the funding in the report cumulatively up to and including that funding period. For example, if period 03 is selected, all funding from periods 01, 02 and 03 will be shown in the report.

By default, when you load in a FIS return, the funding period will change to that of the return period for the ILR.

Current Version

The current version details which iteration of PDSAT you are currently using. It is a point of reference for you to keep track of whether you are up to date with the latest PDSAT or not.

9.1 FIS Settings

The FIS Settings window looks like this (Figure A). This layout is similar to that of the storage settings panel in the FIS program which can be found in FIS menu bar under: **Tools -> Storage Settings** (Figure B).

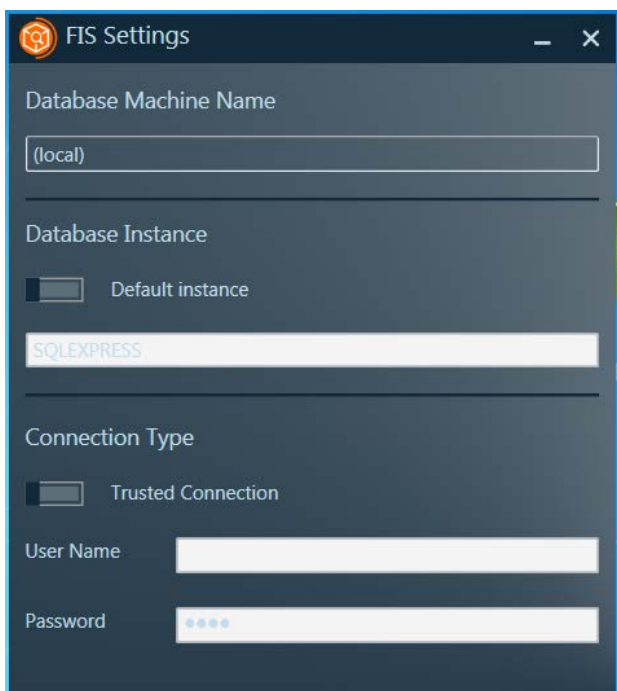


Figure A

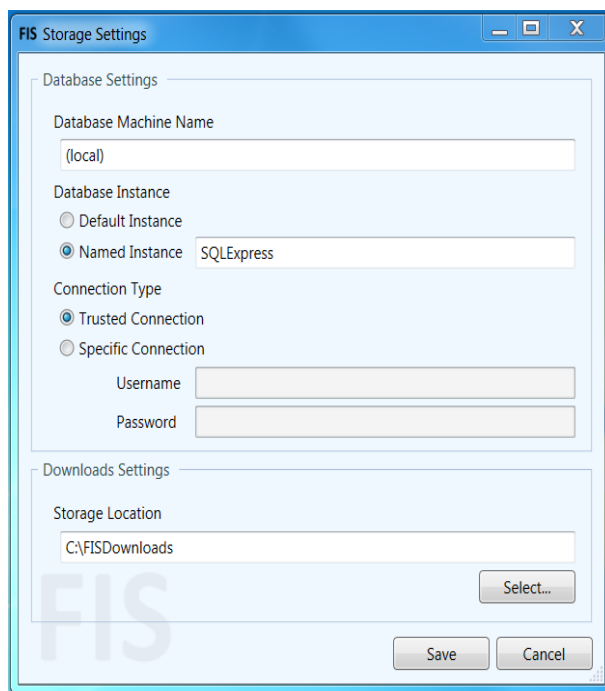


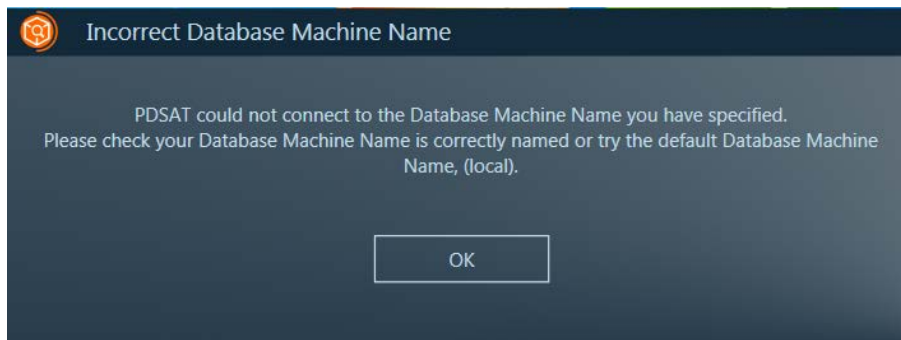
Figure B

Any changes you make to the FIS settings in PDSAT will automatically save when you close the settings window.

Database Machine Name

This setting refers to your machine name that is hosting the database. It is set by default to (local) – as is in settings page in the FIS - and should in almost all instances be kept as this.

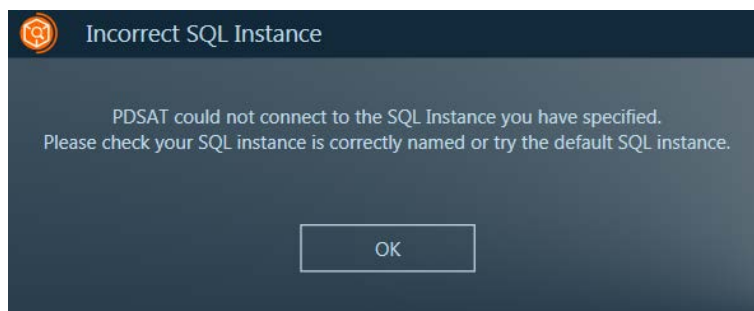
If you specify the wrong Database Machine Name you will be notified with a message like this when you try and import FIS.



Database Instance

This refers to the database instance that FIS is stored in. By default, this is set to "SQLEXPRESS" – as is in the settings in FIS. If you have a named instance in your storage settings in FIS, select the switch to select named instance. This will allow you to type in the named instance that you will use.

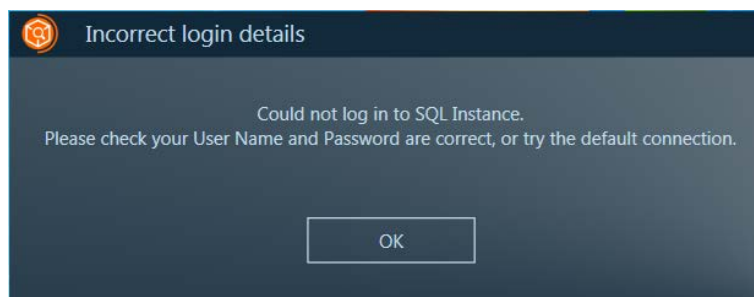
An incorrect named instance will show the following message. If the named instance does not work, try the default instance.



Connection Type

This option is set by default to Trusted Connection, which specifies that a trusted connection should be used to connect to the database. If you have a specific connection you use to connect to the FIS database, please use your user name and password, and these will allow the specific connection to occur.

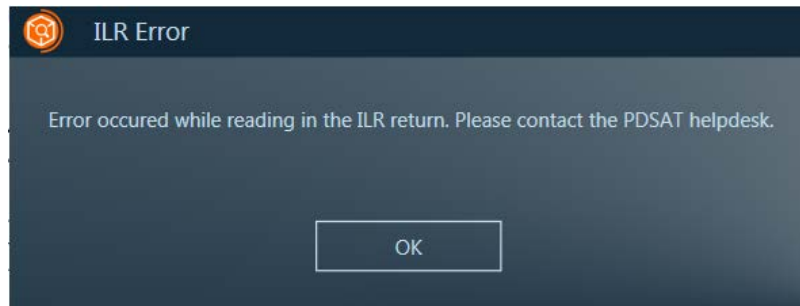
An incorrect named user name and password will show the following message. If the named connection does not work, try the default connection type.





10. PDSAT Support

PDSAT provides a link in the bottom left hand corner which is titled "Email PDSAT helpdesk". Please email us whenever you experience any error messages. You will often be prompted to contact the PDSAT helpdesk in the error message. An example error message may be:



To contact the PDSAT helpdesk, click on this link and an Outlook email message will automatically pop up enabling you to note your enquiry. In addition, if Microsoft Outlook is your default email provider, the log file will automatically attach to the email. If a log file is not attached please manually attach the file via the 'Open Log File' button on the Settings page.

Alternatively please email DSATHelpDesk@kpmg.co.uk for all PDSAT enquiries.

Include the following information:

- Your organisation name
- Your name
- Your email address
- Your contact telephone number
- Your operating system detail e.g. Windows 7
- Your MS Office version e.g. Microsoft Office 2010
- The version of PDSAT you are using
- A description of your problem
- Your log file

The PDSAT Helpdesk will aim to respond to your query within 2 working days.