



Connecting to Ofqual's Data Portal and uploading data



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1 Introduction

Ofqual's Data Portal provides a facility for uploading data securely. It is accessed from the **My Organisation** page of the AO Portal.

The Data Portal replaces Ofqual's secure FTP site and provides users with a dashboard of upcoming requests and recent submissions.

To view the data submissions dashboard and submit files, your Portal user account must be assigned the data submission role. Details of how to set this up can be found under section 2.

As with the secure FTP site, email requests and notifications will continue to be sent from data.services@ofqual.gov.uk. Shortly after you upload a file, you should receive an email, which will confirm whether or not the file has passed our validation checks, and if not will give details of the validation failure to help you correct your file. If you do not receive this confirmation email within an hour of submitting your file please email data.services@ofqual.gov.uk.

Until 31 October 2017 e-mails will be sent to the existing list of contacts we hold for data collection. This is a transition period to allow all organisations to update their user accounts in the Portal.

From 1 November 2017, e-mails will only be sent to Portal user accounts with the data submission role assigned. There is no limit on the number of user accounts that can be assigned the data submission role. Please see section 2.

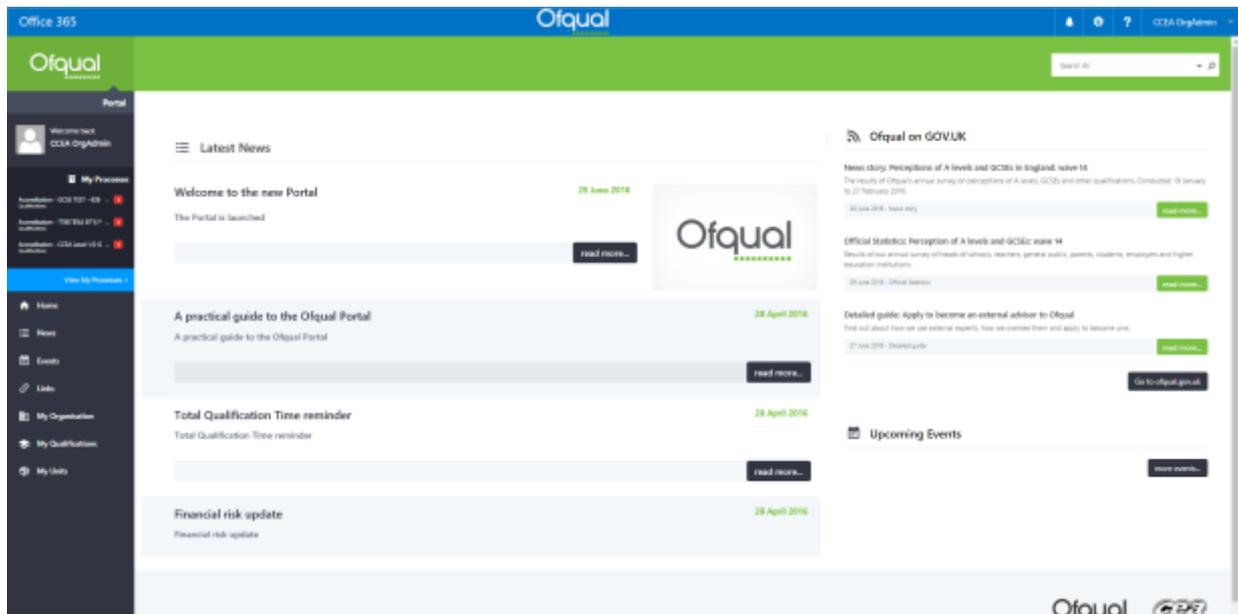
A copy of the e-mail will also be sent to users with the Job Title of Responsible Officer.

2 Connecting to the AO Portal

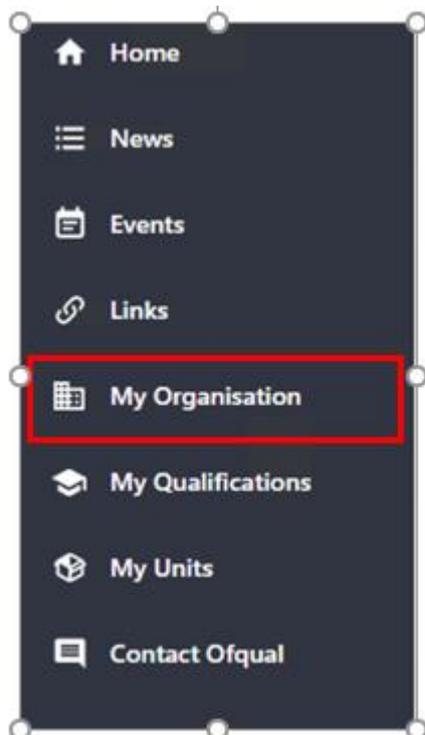
Assigning the data submissions permission

This can be carried out by any Portal user with the role of Organisation Administrator

1. Log into the AO Portal following this link: <http://theportal.ofqual.gov.uk>



2. Select 'My Organisation' from the left hand side navigation bar:



3. Click on 'Manage Users' on the right hand side of the screen. You should then see:

- A table populated with user details, with 10 users per page.
- An add user button.
- Against each user, you will see buttons for 'edit', 'reset password' and 'delete', with hover-over descriptors.

Name	Job Title(s)	Role	Login			
Diane Qualadmin	Responsible Officer	Qualifications & Units	Diane.Qualadmin@dev.ofqual.uk			
Gary Dataadmin	Responsible Officer	Data Submissions	Gary.Dataadmin@dev.ofqual.uk			
Harrison User	Responsible Officer	Standard User	Harrison.User@dev.ofqual.uk			
QualAdmin	Responsible Officer	Qualifications & Units	qual.admin@dev2.ofqual.uk			
OrgAdmin	Responsible Officer	Organisation Administrator	org.admin@dev2.ofqual.uk			
				21-25		
Add User						

4. Create a new user or edit an existing user, ensuring that you assign the **Data Submissions** permission as shown below:

The screenshot shows a 'Create a new user' dialog box with the following fields and options:

- Name:** A dropdown menu followed by 'First Name' and 'Surname' input fields, all marked with an asterisk (*).
- Job Title(s):** A text input field.
- User Permission(s):** Three toggle switches: 'Organisation Administrator' (off), 'Data Submissions' (on and highlighted with a red circle), and 'Event Notifications' (off). There is also a 'Qualifications & Units' toggle switch.
- Phone Number:** An input field with the placeholder text 'Please enter a contact number..' and an asterisk (*).
- Alternative Email:** An input field with the placeholder text 'Please enter an alternative email address..' and an asterisk (*).
- Submit:** A blue button at the bottom right.

A note at the top of the dialog states: 'All fields marked with an asterisk (*) need to be populated in order to create a new user.'

5. Edit the details as required and click 'Save'. A confirmation message will appear at the top of the dialogue box to confirm user details were successfully updated

The screenshot shows an 'Update user details' dialog box with a success message:

Your user was successfully updated.
You can continue to update the current user or close the form.

- 6.

3 Accessing the Data Portal

My Submissions

Once the user has the Data Submissions permission, they will be able to access the data submissions dashboard and submit files.

Click on 'My Organisation'. To the right of the screen you will see 'My Submissions'.

My Submissions

Current		Previous	
Reporting Period	Template	Due Date	Status
2015-2016	SummerAwarding 2 CandidateSubjectLevel	28/04/2017	Closed - Please contact us
June 2017	MissingScripts	29/06/2017	Awaiting submission 
June 2017	Appeals	26/09/2017	Awaiting submission 




This shows upcoming data requests that are due in the near future, displayed in date order. To see recent submissions already made click on the 'Previous' tab. See the next page for a more detailed description of this dashboard.

Reporting Period refers to the academic year, exam series or quarter that the data relates to.

Due Date is the date the data is required, as per the reporting schedule

Status shows whether the system is waiting for a submission or if one has been made and whether it passed validation.

My Submissions

Current Previous

Reporting Period	Template	Due Date	Status	
2015-2016	SummerAwarding 2 CandidateSubjectLevel	28/04/2017	Closed - Please contact us	
June 2017	MissingScripts	29/06/2017	Awaiting submission	
June 2017	Appeals	26/09/2017	Awaiting submission	

< >



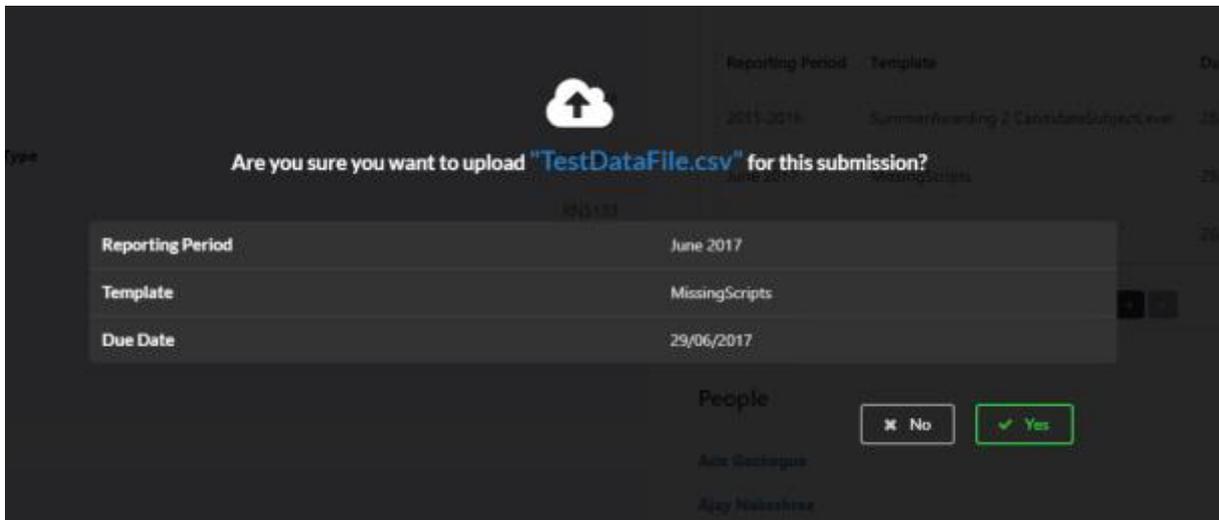
These are the page forward/back buttons.



This is the upload button.

Uploading data

1. To upload data click on the upload button  adjacent to the relevant template on the 'Current' tab and browse to the location of the csv file you want to upload.
2. Click Open and you should see the screen below.



3. Confirm the upload by clicking Yes.
4. You will then be returned to the dashboard and a green progress bar will indicate that the file is being loaded.

My Submissions

Reporting Period	Template	Due Date	Status
2015-2016	SummerAwarding 2 CandidateSubjectLevel	28/04/2017	Closed - Please contact us
June 2017	MissingScripts	29/06/2017	Awaiting submission
June 2017	Appeals	26/09/2017	Awaiting submission 

Navigation buttons: < >

5. If an error occurs, the green progress bar will turn red (see below). This indicates there was an error during the upload, rather than the file has failed validation rules. Should this happen, refresh the page and try uploading the file again. If the error persists please contact Data.Services@ofqual.gov.uk

My Submissions

Reporting Period	Template	Due Date	Status
2015-2016	SummerAwarding 3 CandidateUnitLevel	26/04/2017	Closed - Please contact us
June 2016	EaRs DR1	25/08/2016	Closed - Please contact us
2015-2016	SummerAwarding 1ab GradeBoundary	26/04/2017	Closed - Please contact us
June 2016	T1 Entries	06/04/2016	Closed - Please contact us
2016-2017	SummerAwarding 3 CandidateUnitLevel	09/08/2017	Failed validation - Resubmit

6. Once the file has uploaded the 'Status' will change to 'Submitted'.

My Submissions

Reporting Period	Template	Due Date	Status
2015-2016	SummerAwarding 2 CandidateSubjectLevel	28/04/2017	Closed - Please contact us
June 2017	MissingScripts	29/06/2017	Submitted
June 2017	Appeals	26/09/2017	Awaiting submission

7. Refresh the web page and you will see the current status of your submission.

My Submissions

Current		Previous	
Reporting Period	Template	Due Date	Status
June 2017	MissingScripts	29/06/2017	Pending validation

8. If the file passes the validation checks, it will disappear from the 'current' tab of the dashboard and be displayed under the 'Previous tab. You will receive an email confirming that your file has been accepted.

My Submissions

Current		Previous	
Reporting Period	Template	Due Date	Uploaded On
June 2017	MissingScripts	29/06/2017	19/07/2017

9. Alternatively, if it fails validation an error message will be displayed on the 'Current' tab. You will receive an email from data.services@ofqual.gov.uk with further details of the validation failure. Once you have amended your file to correct the issues, please upload the new version.

June 2017	MissingScripts	29/06/2017	Failed validation - Resubmit	
				

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