Appendix 1: Downloading and submitting HESF19

1. This appendix gives guidance on how to access the OfS portal to download your HESF19 workbook and how you should submit your HESF19 survey. There are also some common issues listed.

2. The information in this appendix has been expanded on in a webinar detailing the submission of HESES18. You can view this webinar using the following link: www.youtu.be/8Wte11i9FMc.

Assigning yourself to the HESF19 OfS portal survey area

3. In order to access your HESF19 workbook, you will need to download it from the OfS portal: https://extranet.officeforstudents.org.uk/Data/.

4. You will need to be a registered user of the OfS portal to be assigned to the HESF19 survey area, from which you will download your HESF19 workbook.

5. If you have not registered on the OfS portal before, you will need to ask the nominated portal user administrator at your provider to create an account for you. Each person who requires access to the HESF19 return will need to be registered with their own account.

6. You will need to be assigned to the HESF19 survey area by the nominated OfS portal user administrator at your provider. The user administrator can find guidance on how to add users to portal areas on the main portal login page. If you are the user administrator, you will still need to assign yourself to the HESF19 survey area.

7. If you do not know who your user administrator is, you can view the user administrators at your provider by logging onto the OfS portal. Select 'My account' towards the right hand side of the yellow banner, then click 'Activate an access key'. The names and contact details of the user administrators at your provider will be at the top of the page. If you are not registered and do not know who your user administrator is, please contact portal@officeforstudents.org.uk.

Common issues with accessing the portal

I cannot log into the OfS portal

8. If you receive an error message while trying to log in, you may be entering the wrong email address or password, or your account may be locked. Ensure that the email address you are using is correct, and then request a new password. You will be sent a new password, which you will be asked to change when you log in. You can also ask your user administrator to reset your password.

9. If this new password does not grant you access, it is likely that your account is locked. Contact your user administrator, who can unlock your account for you. It is advisable that you also request a password change at the same time. If you or your user administrator have any problems, please contact portal@officeforstudents.org.uk.

The HESF19 survey has not appeared on my login page even after I have been assigned to it

10. Once you have been assigned to a survey, you may need to log out and then log back into the portal in order for the survey to appear under 'Home'.

Downloading your HESF19 workbook

11. Once you have been assigned to the HESF19 survey, log in to the OfS portal and you will see a link for the HESF19 survey under the 'Home' section. This link will take you to the HESF19 survey.

12. To download the HESF19 workbook, click on the 'Download' button. You will receive a zipped file which will contain your HESF19 workbook. You may need to unzip the file before accessing the workbook. You may also need to click on 'Enable editing' on the yellow banner if it appears on your screen when you open your workbook. You can download this empty workbook as many times as required.

13. Save the workbook to a memorable location on your computer. If there are any issues with downloading your workbook, please contact us at portal@officeforstudents.org.uk.

Completing your HESF19 workbook

14. HESF19 is provided as an Excel workbook with the file extension '.xlsx'. You should not attempt to alter the format of the worksheets by adding or deleting columns or rows. Only cells where data is required should be edited. The workbook is protected to ensure that the data submitted is accurate and is only entered into the relevant cells. Worksheets contain information critical to accurate loading of the data; it is essential that this is preserved. Previously there have been instances where individuals have unprotected the workbook using an unofficial macro downloaded from the internet. We will refuse to accept any workbooks which have been unprotected or tampered with. If you would like to view an unprotected version of the workbook, you can download sample tables from the OfS website; however, please do not use these tables as your final submission.

15. We recommend that you do not simply copy and paste data into your workbook, as this can affect formatting. If you wish to copy and paste data, ensure that you select one of the 'Paste Values' options. This will not copy the formatting of the data you are pasting and will preserve the formatting of the workbook.

16. For more information on how to complete your HESF19 workbook, see Part 1 of the HESF19 guidance.

Common issues while completing the HESF19 workbook

The workbook is slow to process when I enter information

17. As the workbook contains a lot of information, there may be times when it may appear slow to process information that has been entered. Please be patient when you are completing the workbook; the workbook will process the information. You can speed up the processing time by closing any other Excel workbooks you have open.

A cell has locked after I have copied and pasted data into it

18. Unfortunately, if you have copied and pasted data into the workbook without using the 'Paste Values' option, you will not be able to unlock any cells that may have become locked. You will need to download another empty workbook from the portal and start again.

Uploading your HESF19 workbook

19. Once you have completed the HESF19 return, you will need to submit the workbook to the HESF19 survey area on the OfS portal. You should ensure that:

    - your workbook hasn't been saved with the setting that displays zero values as blanks

    - links to other spreadsheets are removed

    - only one worksheet is selected when the completed workbook is uploaded.

These things can stop the workbook uploading successfully.

20. Do not zip the workbook before uploading, as this may prevent the workbook loading successfully.

21. Submit the workbook as follows:

    a. Navigate to the HESF19 survey on the OfS portal.

    b. Click on the 'Upload' button.

    c. Browse for your HESF19 workbook which is saved in your memorable location.

    d. Click 'Upload'.

    e. The workbook may take some time to upload if the portal is busy. The page will automatically refresh to show if your file is waiting to be processed, being processed or has completed successfully.

    f. Check below the status bar for the log of your submission. The 'Outcome' will display as a 'Success' if there are no issues with the uploaded workbook.

    g. Check the 'Comments' to see if your workbook has successfully uploaded. See below for a description of some of the messages that may appear.

22. Once you have successfully submitted your workbook, check the results package by clicking on the 'Results' button. The results package contains the workbook that you have submitted, which has now been processed. This workbook will display the date submitted and the submission number that we have assigned to it.

23. Completed workbooks can be uploaded any number of times until the deadline for submissions, when we will take the latest uploaded version as the final version for submission. The deadline for the final submission is **noon on Wednesday 19 December 2018**.

Common issues while uploading the HESF19 workbook

My workbook contains validation errors

24. See Appendix 2 of the HESF19 guidance for descriptions of validation errors. You will still be able to upload your workbook if it is invalid, but we will **not** accept it as a submission. Once you have uploaded your workbook, download the results package. The workbook will contain an additional 'Validation' sheet, which will detail the specific validation errors.

The 'Comments' section of the OfS portal shows validation errors

25. Your workbook is invalid. The results workbook will contain an additional 'Validation' sheet, which will detail the specific validation errors. We will not accept any workbooks with validation errors.

The 'Comments' section of the portal shows errors and no results package is generated

26. Your workbook has failed to process. There can be many reasons for the workbook not processing correctly. One common error is that the file has been zipped. Before uploading, please ensure that the file is not zipped as this will make it more likely to process successfully. A second common error is a change in the file extension of the workbook; it must end with '.xlsx'. If you have unprotected the workbook in any way, this may also cause the upload to fail.

The submission number of the workbook in the results package is different from the submission number that I submitted the workbook with

27. When the workbook is submitted for processing, our systems will assign a submission number to that particular workbook. This correlates to the number of workbooks that have been submitted to the portal for your provider, and is unique to the provider, not to the individuals who upload the workbook.

My colleague has uploaded a HESF19 workbook but I cannot view the results package

28. The results package can only be downloaded and viewed from the same OfS portal account that uploaded that particular workbook. In order to view the results package for a specific workbook you will need to upload the same workbook using your own portal account. Note that this will increase the submission number.

There is no sign-off form in my HESF19 results package workbook

29. We will only provide the sign-off form once we have verified the HESF19 data. This will be emailed to the HESF contact at your provider by the OfS data verifier.