

Downloading and submitting HESES18 and HESF19

Danny Shone

Presentation aims

In this presentation, we will cover:

- The Office for Students portal
- Timeline for HESES18 and HESF19 processes
- Downloading your workbook
- Completing and submitting your workbook





Office for Students portal

The OfS portal

The OfS portal is a secure way to transfer data between providers and the OfS

- We use the OfS portal to collect the HESES18 and HESF19 surveys.
- The OfS portal can be accessed via:

<https://extranet.officeforstudents.org.uk/Data/>



Welcome to the OfS portal

Accessing the survey area

- Each survey has its own 'area' on the portal in which you can download and submit the survey
- Each colleague that will be working on the survey will need to be granted access to the survey area by the OfS user administrator nominated at your provider
- If you already have a portal user account, you can find out who your user administrator is by logging in to the portal
- Survey areas will be made available in late October 2018.

The user administrator's role (1)

- Your provider's user administrator will grant you access to the survey area on the portal
- Your head of provider would have received a letter with details about nominating a user administrator
- They will need to log in to the user administrator site in order to do this:

<https://extranet.officeforstudents.org/Users/>

The user administrator's role (2)

- The user administrator can also:
 - Create user accounts
 - Unlock accounts
 - Change passwords
- If you are the user administrator and need access to the survey area, you will still need to grant yourself access
- Guidance for user administrators is available on the portal log in page (at the top right of the page)



Welcome to the OfS portal



To access the portal, you will need an account. If you were previously a user of the HEFCE extranet, you will already have an account and can use your existing login details. If you were not, you will need to [create an account](#) using the access key which was sent to you by post or email.



Downloading your survey workbook

Submission timeline

Date	Activity
Late October 2018	Survey workbooks available for download from the OfS portal
From late October	Provider completes survey workbook
Noon on Wednesday 19 December 2018	Deadline for submission of both HESES18 and HESF19

Survey area

- Once your user administrator has granted you access to the survey area, you can then download the survey workbook.
- First, log in to the portal, then find the survey area in the list under the 'Home' heading.

Home

Welcome to your home page. If you have an access key to apply for OfS registration, please [click here](#).

If you require assistance, please contact portal@officeforstudents.org.uk.

HESES18 - HEIFES18 - HESF19

Download and submit your HESES18 HEIFES19 HESF19 survey here

Download your workbook

- In the survey area, click on the 'Download' button to obtain your workbook.
- A zip file will be downloaded containing your workbook. Save your workbook to your device.

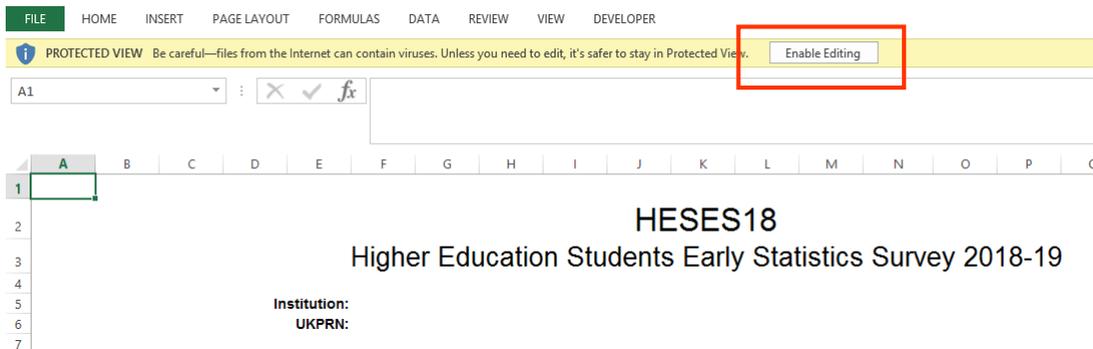
HESES18 - HEIFES18 - HESF19

This is an example of a **HESES18 - HEIFES18 - HESF19** survey area. This text will be updated throughout the process.

Download	Download the files required for HESES18 - HEIFES18 - HESF19
Upload	Upload the files for HESES18 - HEIFES18 - HESF19

The workbook

- Once you open your workbook, ensure to click on the 'Enable editing' button if it appears, so that you are able to complete your survey.





Completing your workbook

Input your data

- Fill in your workbook according to the guidance for your survey.
- Ensure that you follow the instructions given in Part 1 of the guidance.
- Ensure that you follow the survey definitions given in Part 2 of the guidance.

Workbook protection

- The workbook is password protected to ensure that it can be successfully submitted.

Worksheets contain information critical to accurate loading of the data; it is essential that this is preserved.

We will refuse to accept any workbooks which have been unprotected as we cannot be certain of our ability to load the data contained in them correctly.

Providers should be aware that providing the OfS with such a workbook may be in breach of conditions of registration. We are aware that certain software packages remove the saved passwords; please let us know if you think you may have removed the password in error in this way.

Cell formats

- Please be aware of the format of the cells when completing your workbook. If a cell is numeric, only enter numbers.
- Some cells are locked to protect formulas or because they should not contain values. These cells are generally blue or grey in colour and you will not be able to edit them.

Column 4		
Automatically populated		
Estimated completed years		
academic year 2018-19		
(Columns 1 + 2 + 3)		
Home and EU		
OfS- fundable	Non- fundable	Island and overseas
(a)	(b)	(c)
0.00	0.00	0.00
0.00	0.00	0.00
0.00	0.00	0.00
0.00	0.00	0.00
0.00	0.00	0.00



Finalising your workbook

Finalising your workbook

- Once you have completed all of the relevant tables in the workbook, you will need to review the 'Information' tab.
- You will need to check the status of the 'Validation check', 'First-stage credibility check' and 'Comparison table highlighting' flags.

Validation check:	No validation errors
First-stage credibility check:	No first-stage credibility warnings

Validation check

- Your workbook will only be accepted if the 'Validation check' displays 'No validation errors'.
- If your return is not valid, a list of the workbook tables affected will be listed in red. You will need to investigate these errors further before submitting. Part 1 of the guidance and Appendix 2 contain more information about these errors.

Validation check: Table 1 (Full-time); Table 5 (Planning); Please see Appendix 2 for details of validation checks (see below)

- Your workbook will also be invalid if the date is before the census date of the survey.

First-stage credibility check (HESES only)

- You will also need to review any credibility checks that are displayed in your workbook. These checks are displayed if your data looks unusual.

First-stage credibility check: Table 1 (Full-time); Please see Appendix 3 for details of credibility checks (see below)

- A list of the workbook tables affected will be listed in orange. You should investigate these further before submitting. Part 1 of the guidance and Appendix 3 contain more information about the credibility checks.
- You will be asked questions about these checks during the data verification phase. Please email your initial explanations for these checks to the OfS when you submit your workbook.



Submitting your workbook

Uploading your workbook (1)

- Once you have resolved any validation errors, you will need to upload your workbook to the OfS portal.
- Log in to the portal and navigate to the HESES18 or HESF19 survey area.
- Click the upload button.

HESES18 - HEIFES18 - HESF19

This is an example of a HESES18 - HEIFES18 - HESF19 survey area. This text will be updated throughout the process.

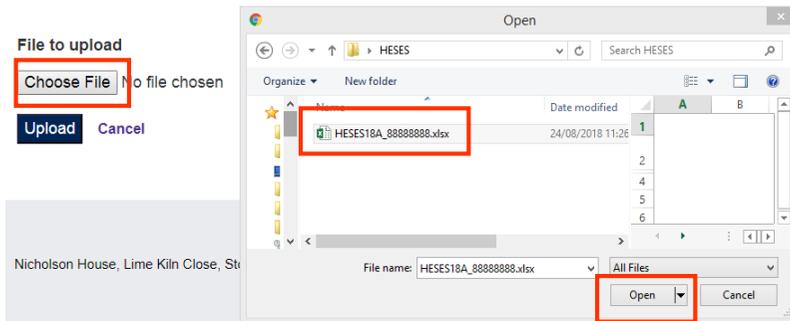
Download	Download the files required for HESES18 - HEIFES18 - HESF19
Upload	Upload the files for HESES18 - HEIFES18 - HESF19

Uploading your workbook (2)

- Click on 'Choose file' and navigate to where you have saved your completed workbook. Click on the file, then click 'Open'.

HESES18 - HEIFES18 - HESF19

Please use the form below to locate files on your computer or network, then select the 'Upload' button.



Uploading your workbook (3)

- Finally, click the 'Upload' button.

HESES18 - HEIFES18 - HESF19

Please use the form below to locate files on your computer or network, then select the 'Upload' button.



Submission queue

- You will then be transferred back to the survey area.
- A box will appear informing you that your file has been submitted and is waiting to be processed.

HESES18 - HEIFES18 - HESF19

This is an example of a HESES18 - HEIFES18 - HESF19 survey area. This text will be updated throughout the process.

 Your files have been submitted and are waiting to be processed.
This may take several minutes. Please return to this page later to verify your submission has been processed successfully.

- The OfS portal only processes one file at a time, so you may be in the submission queue for several minutes.

Processing

- The status box will automatically update once your submission reaches the front of the queue and starts processing.

HESES18 - HEIFES18 - HESF19

This is an example of a HESES18 - HEIFES18 - HESF19 survey area. This text will be updated throughout the process.

 Your files are being processed.
This may take several minutes. Please return to this page later to verify your submission has been processed successfully.

Successfully processed

- Once the file has finished processing, you should see the message below if it has processed successfully.

HESES18 - HEIFES18 - HESF19

This is an example of a HESES18 - HEIFES18 - HESF19 survey area. This text will be updated throughout the process.

✔ Completed successfully on 10 September 2018

- You will also see a successful outcome in the 'History of submission' section.

History of submissions

Process submitted 10 September 2018 13:24:49	
Completed	10 September 2018 13:26:11
Outcome	Success
Comments	413658-HESES18A_88888888.xlsx was processed successfully
Files	HESES18A_88888888.xlsx HESES18A_88888888.zip

Results package (1)

- Once you receive the message of successful completion, you should download the results package by clicking the 'Result' button.

Download	Download the files required for HESES18 - HEIFES18 - HESF19
Upload	Upload the files for HESES18 - HEIFES18 - HESF19
Result	Download the results package

Results package (2)

- The results package is a recreation of the workbook that you uploaded, with an updated submission number and date uploaded, as displayed on the 'Information' tab of the results workbook.

Workbook information

Date submitted: 10/09/2018
Submission number: 3

- Please ensure that you use this results package workbook to make any further amendments to your data. We will use this workbook to sign off your data.

Processed with validation errors (1)

- You can still upload your workbook with validation errors, we just cannot accept it as a valid submission. This can be helpful to determine where the validation errors are.
- You will receive the following messages:

 An error occurred with the last submission. Please see the errors below.

History of submissions

Process submitted 10 September 2018 13:52:37	
Completed	10 September 2018 13:54:10
Outcome	Warning
Comments	413677-HESES18A_88888888.xlsx was processed with validation errors

Processed with validation errors (2)

- A results package will still be generated for the submission. You can use this to view more detail about the validation errors.
- When you download the results workbook, you will find a new 'Validation' tab with details of the errors, by cell.

Validation failures

This submission will not be accepted until all of the errors below have been fixed.

Table	Price group	Mode	Length	Level	Column	Field	Code	Validation failure
Table 1 (Full-time)	A	Full-time	Standard	PGT (Masters' loan)	Column 1	Non-fundable	H04	Negative value
Table 1 (Full-time)	A	Full-time	Standard	PGT (Masters' loan)	Column 4	Non-fundable	H04	Negative value
Table 1 (Full-time)	A	Full-time	Standard	PGT (Masters' loan)	Column 4a	Non-fundable	H04	Negative value
Table 5 (Planning)	All	Full-time and sandwich year out	All	PGT (Masters' loan)	Section A; Column 1	Non-fundable	H503	Total not equal to total in Tables 1 and 2, or 3

- You should review these errors, fix the errors in the results workbook, and resubmit your survey.



Other submission information

Workbook updates (1)

- We may be required to update your workbook during the process
- The workbook contains a 'Template version' number and description which will identify which version of the workbook you are using. This can be found on the Information tab.

HESES18 - HEIFES18 - HESF19

Institution: Poppleton University
UKPRN: 88888888

Date submitted: Not yet submitted
Submission number: Not yet submitted

Template version: 1 (released 31/10/18)
Template notes: Initial release

Workbook updates (2)

To obtain an updated workbook, you have two options:

1. Download a new workbook template and copy any inputted data from an old workbook across to the new workbook.
2. Upload the old workbook to the portal, then download the processed results workbook and continue working on the results version. The results version of the workbook will always be the most up to date template.

Data protection

You should not email any information to anyone that could identify a particular student. This includes sending information about particular areas where there are a small number of students, for example, a small number of students on a particular course.

Due to this, you should always upload your workbook to the portal and not send the workbook by email, unless we have requested that you do so.

If you need to send us any additional information that could be sensitive, contact us and we will be able to arrange a secure method of transferring the information.

Submission deadlines

You can submit your workbook as many times as required before the deadline for your survey. Extensions to these deadlines will not be granted.

HESES18 – noon on Wednesday 19th December 2018

HESF19 – noon on Wednesday 19th December 2018

If you submitted your workbook before the census date of your survey, you will need to resubmit in order for your submission to be valid.

We will use your latest submitted workbook for data verification and onward use. We will not be able to revert to past iterations of your workbook.

What we covered

- The OfS portal
- Timeline for HESES18 and HESF19 process
- Downloading, completing, finalising and submitting your survey workbook



Further information

You can contact the following inboxes for further guidance:

General portal queries – portal@officeforstudents.org.uk

HESES18 queries – heses@officeforstudents.org.uk

HESF19 queries – recurrentgrant@officeforstudents.org.uk

This presentation is also available as a webinar:

<https://youtu.be/8Wte11i9FMc>

Thank you for watching

Images used under a CC0 1.0 license:

- slide 2 by QuinceMedia (<https://pixabay.com/en/arrow-target-bullseye-goal-aim-2886223/>)
- slide 3 by geralt (<https://pixabay.com/en/matrix-technology-technique-data-3407242/>)
- slide 8 by ddzphoto (<https://pixabay.com/en/field-crop-storm-agriculture-farm-3416824/>)
- slide 13 by Pexels (<https://pixabay.com/en/apple-caffeine-coffee-coffee-shop-1850613/>)

Thank you for watching

- Slide 17 by GDJ (<https://pixabay.com/en/binary-0-1-background-3322478/>)
- Slide 21 by Free-Photos (<https://pixabay.com/en/pier-jetty-wooden-beach-sand-801761/>)
- Slide 32 by Free-Photos (<https://pixabay.com/en/books-pages-story-stories-notes-1245690/>)
- Slide 37 by GDJ (<https://pixabay.com/en/thumbs-up-agree-approve-condone-3350838/>)

The copyright in this presentation is held either by the Office for Students (OfS) or by the originating authors.

Please contact info@officeforstudents.org.uk for further information and re-use requests.