

Guidance for error summaries

OfS portal

1. The error summary templates are available to download and are required to be uploaded via the OfS portal at <https://extranet.officeforstudents.org.uk/data>. This will be in the portal areas titled 'Error Summary: individualised data' and 'Error Summary: aggregate data'.
2. You will need to be already registered on the OfS portal to be assigned to either of these Error Summary portal areas.
3. If you have not registered on the OfS portal before, you will need to ask the nominated OfS user administrator at your institution to create an account for you.
4. You will need to be assigned to the relevant Error Summary portal area by the nominated OfS user administrator at your institution. The user administrator can find guidance on how to add portal 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 Error Summary portal area.
5. If you do not know who your user administrator is, you can view the user administrators at your institution by logging onto the OfS portal, navigating to 'My Account', then clicking 'Join area'. Your user administrators and their contact details should be listed.

Downloading an Error Summary

6. There are two Error Summary workbooks available to download from the Office for Students portal. These are:
 - a. the **individualised** Error Summary should be used for amendments to DLHE, ILR, HESA Student, HESA AP Student and HESA Staff data
 - b. the **aggregate** Error Summary should be used for amendments to HESES, HEIFES, HESA Estate, HESA Finance, HEBCI, Aggregate Offshore, TRAC and TRAC(T) data.
7. Please download the relevant Error Summary for the data return you wish to correct and fill in the details of the correction. A detailed description of how to fill out the Error Summary can be found in the 'Coverpage' and 'Notes' sheets within the Error Summary workbook.

Submitting an Error Summary

8. In order to submit an Error Summary it must be uploaded to the relevant survey in the Error Summary portal area. You will have access to two surveys: "Error Summary: Individualised data" and "Error Summary: Aggregate data".
9. Submit the workbook as follows:

- a. Navigate to either the “Error Summary: Individualised data” or “Error Summary: Aggregate data” survey on the OfS portal depending on which Error Summary you wish to submit.
 - b. Click on the ‘Upload’ button.
 - c. Browse for your Error Summary which is saved in your memorable location.
 - d. Click ‘Upload’.
 - e. The workbook may take some time to upload if the portal is busy. A status of ‘Waiting’ means that you are currently in the queue. A status of ‘Processing’ means that your workbook is now being uploaded. The status will show ‘Completed’ once the process has finished.
 - 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.
10. 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 now display your UKPRN and provider name.
 11. 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 the next panel.