

USER MANUAL

BULK UPLOAD

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JANUARY 2014

We recommend installing the latest Adobe Acrobat Reader for the best viewing experience: <http://get.adobe.com/reader/>



BULK UPLOAD PROCESS

This guide is designed to take you through the Bulk Upload process step by step. It has been designed to be interactive and so when you see text in this format: [example link](#), it means that there is a link to follow either to a website or somewhere specific within the document.

The Bulk Upload facility allows you to enter the apprentice, employer and framework information into an Excel or CSV format spreadsheet. This information can then be uploaded to the system which will create the apprentices records within MA Online 2. Don't forget that once the records have been created on MA Online, you will still need to access them and complete the apprentices record and load the certification evidence.

There are two ways that the spreadsheet can be completed. You can either enter the required information or use an automated download process. Some suppliers of the commonly used training provider management systems have developed specific automated processes.

Please note that there is a limit to the facility in that you can load a maximum of 999 apprentices in one go.

In order to use the Bulk Upload facility you will need to log into modernapprenticeships.org.

Once logged in under the **Apprentices tab** ① you will see the option **Bulk Upload** ②.

This will take you to the Bulk Upload section where you can download the template document that needs to be completed and also where you will need to upload the completed CSV file.

There are two file formats that are available for the Bulk Upload facility. The **Excel** file can be found on the **MA Online 2 website** ③, this is the file that we recommend to use. There is also a **CSV** file available from the MA Online support team and if you wish to use this format, please contact:

Telephone:03003034444

E-mail: maonline@fiss.org

REMEMBER!

Both file formats require codes to be entered for some of the fields. This is due to the corresponding field on MA Online 2 having a drop down menu that requires a selection to be made. Each menu selection has a corresponding code in the underlying MA Online 2 database.

The screenshot displays the 'Bulk Upload' section of the Modern Apprenticeships portal. At the top, a navigation bar shows various status tabs, with 'Apprentices' (1) being the active tab. Below this, a secondary navigation bar includes 'View Apprentices', 'Add Apprentice', and 'Bulk Upload' (2). The 'Bulk Upload' section is divided into several functional areas: 'CSV File' with a file selection interface; 'Templates' offering a download for an 'Excel(XLS) empty template' (3); 'Sample Templates' providing 'Good Example' and 'Bad Example' downloads; a 'User Guide' for the bulk upload process; and a 'Framework and Pathway ID Helper' section with dropdown menus for 'Framework', 'Framework Level', and 'Pathway Code & Name', alongside a 'Pathway #' field.

| FIELD | SELECTION | CODE |
|---------------|--|------|
| PREFIX | Mr | 1 |
| | Mrs | 2 |
| | Ms | 3 |
| | Miss | 4 |
| GENDER | Female | 1 |
| | Male | 2 |
| ETHNIC GROUP | English/Welsh/Scottish/Northern Irish/British | 31 |
| | Irish | 32 |
| | Gypsy or Irish Traveller | 33 |
| | Any other White Background | 34 |
| | White and Black Caribbean | 35 |
| | White and Black African | 36 |
| | White and Asian | 37 |
| | Any other Mixed / Multiple ethnic background | 38 |
| | Indian | 39 |
| | Pakistani | 40 |
| | Bangladeshi | 41 |
| | Chinese | 42 |
| | Any other Asian Background | 43 |
| | African | 44 |
| | Caribbean | 45 |
| | Any other Black / African / Caribbean background | 46 |
| | Arab | 47 |
| | Any other ethnic group | 98 |
| | Not provided | 99 |
| EMPLOYER SIZE | 0-10 | 1 |
| | 11-50 | 2 |
| | 51-250 | 3 |
| | 250+ | 4 |

The spreadsheet requires **all** mandatory fields to be completed for the Apprentice and Employer. Both of these have drop down menus for selections to be made such as ethnicity and gender. Where there is a drop down menu, a numerical code is required on the spreadsheet so that it can be converted by the system to display the selection correctly within the apprentices record.

The tables on this page details those fields that require a code and what the code is for each possible selection.

| FIELD | YES | NO |
|-------------------------|-----|-----|
| APPRENTICE FUNDING | 1 | 0 |
| TRAINING AGREEMENT HELD | 1 | n/a |
| ASYLUM SEEKER | 1 | 0 |

| FIELD | YES | NO |
|----------------------------|-----|----|
| DISABILITY | 1 | 0 |
| MENTAL/PHYSICAL IMPAIRMENT | 1 | 0 |
| ESOL NEED | 1 | 0 |

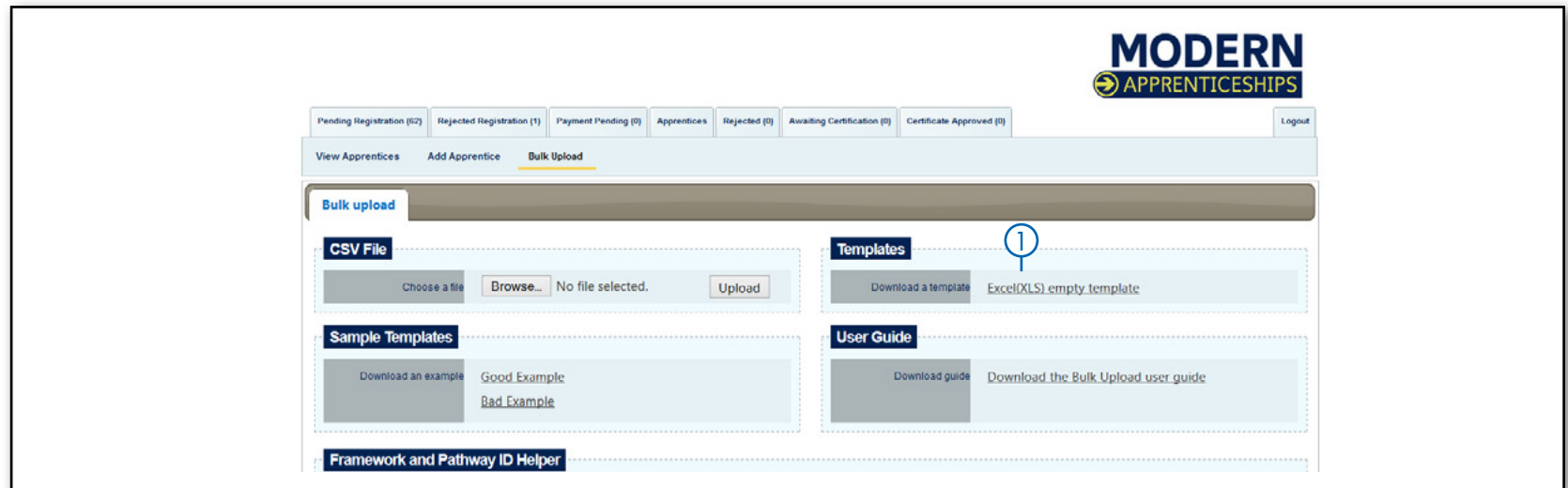
| FIELD | SELECTION | CODE |
|--------------------|--|------|
| APPRENTICE COUNTRY | UK | 232 |
| EMPLOYER SECTOR | Agriculture, Forestry and fishing | 1 |
| | Care | 2 |
| | Construction, building services engineering and planning | 3 |
| | Creative media and entertainment | 4 |
| | Education | 5 |
| | Energy production and utilities | 6 |
| | Health | 7 |
| | Hospitality, tourism and sport | 8 |
| | Information and communication technologies | 9 |
| | Real estate and facilities management | 10 |
| | Transport and storage | 11 |
| | Wholesale and retail trade | 12 |
| | Financial, insurance & other professional services | 13 |
| | Government | 14 |
| | Manufacturing | 15 |

When you are on the **Bulk Upload** page you are able to download the Excel (XLS) empty template ①. You can either save the file or open the document. It will open within Excel.

- There are examples of good and bad completion on the Bulk Upload web page.
- Some fields are marked with an * this is because they are mandatory requirements. When you open the spreadsheet you will see the following fields ②.

TIP

We recommend that you download a new template each time you use the bulk upload facility as it will be reflective of the most up-to-date mandatory fields required by the system. Don't forget you can find examples of good and bad completion on the Bulk upload page.



| ② APPRENTICE DETAILS | APPRENTICE INFORMATION | EMPLOYER INFORMATION | ADDITIONAL INFORMATION | FRAMEWORK INFORMATION |
|-----------------------------|-------------------------------------|------------------------|---------------------------------|-----------------------|
| Prefix | Apprentice House Number* | Employer Name* | Training Agreement Held* | Pathway* |
| Gender* | Apprentice Street* | Contact * | Asylum Seeker | |
| Forename* | Apprentice Postcode* | Employer Size* | Disability | |
| Middlename | Apprentice Town* | Contact Position | Any mental/physical impairment | |
| Surname* | Apprentice Country* | Employer House Number* | ESOL needs | |
| Date of Birth* (DD/MM/YYYY) | Apprentice Email | Employer Street* | Unemployed at start of training | |
| Ethnic Origin* | Apprentice Phone | Employer Postcode* | Apprentice Publicity Funded* | |
| NI Number* | Apprentice Start Date* (DD/MM/YYYY) | Employer Town* | PO Number | |
| Unique Number | Apprentice End Date* (DD/MM/YYYY) | Employer Email | Notes | |
| | | Employer Phone* | | |
| | | Employer Sector* | | |

The **Pathway column** in the spread sheet matches those pathways within the MA frameworks stored on MA Online 2. In order for the system to identify the pathway due to be completed by the apprentice you need to use the correct code.

With frameworks continually being reviewed and implemented we are unable to provide up to date codes within this guidance. However, to assist you we have included an **ID helper** ① within the **Bulk Upload page**. This tool will enable you to find any code you need and is up-dated when new frameworks are implemented.

To determine the pathway identification number you will need to:

- Select the **Framework** ②
- Select the **Framework level** ③
- Followed by the **Pathway Code and Name** ④ The number that you need to enter into the spread sheet are then displayed to the right of the **Pathway Code and Name** ⑤

As you can see here in the example the pathway code is: 273. When you upload the file to MA Online the framework and pathway will be populated.

Pending Registration (83)
Rejected Registration (1)
Payment Pending (0)
Apprentices
Rejected (1)
Awaiting Certification (0)
Certificate Approved (1)

Logout

View Apprentices

Add Apprentice

Bulk Upload

Bulk upload

CSV File

Choose a file

Browse...

No file selected.

Upload

Templates

Download a template

Excel(XLS) empty template

Sample Templates

Download an example

[Good Example](#)
[Bad Example](#)

User Guide

Download guide

Download the Bulk Upload user guide

Framework and Pathway ID Helper

Framework

Barbering (Hairdressing and Beauty Industry Authority)

2

Framework Level

3

3

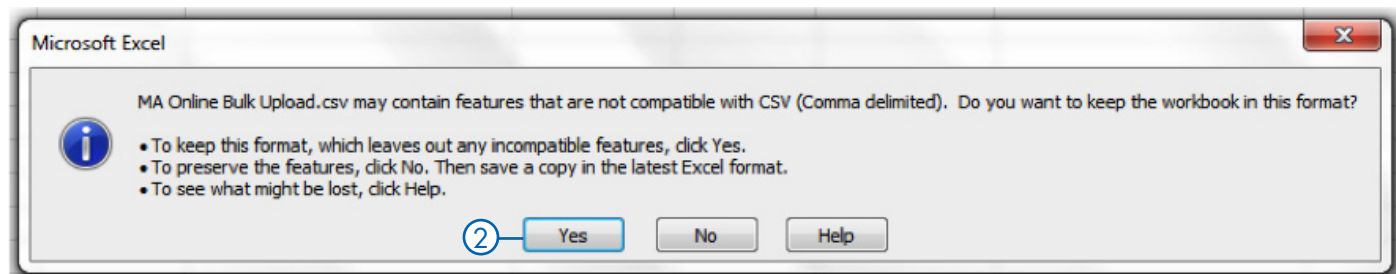
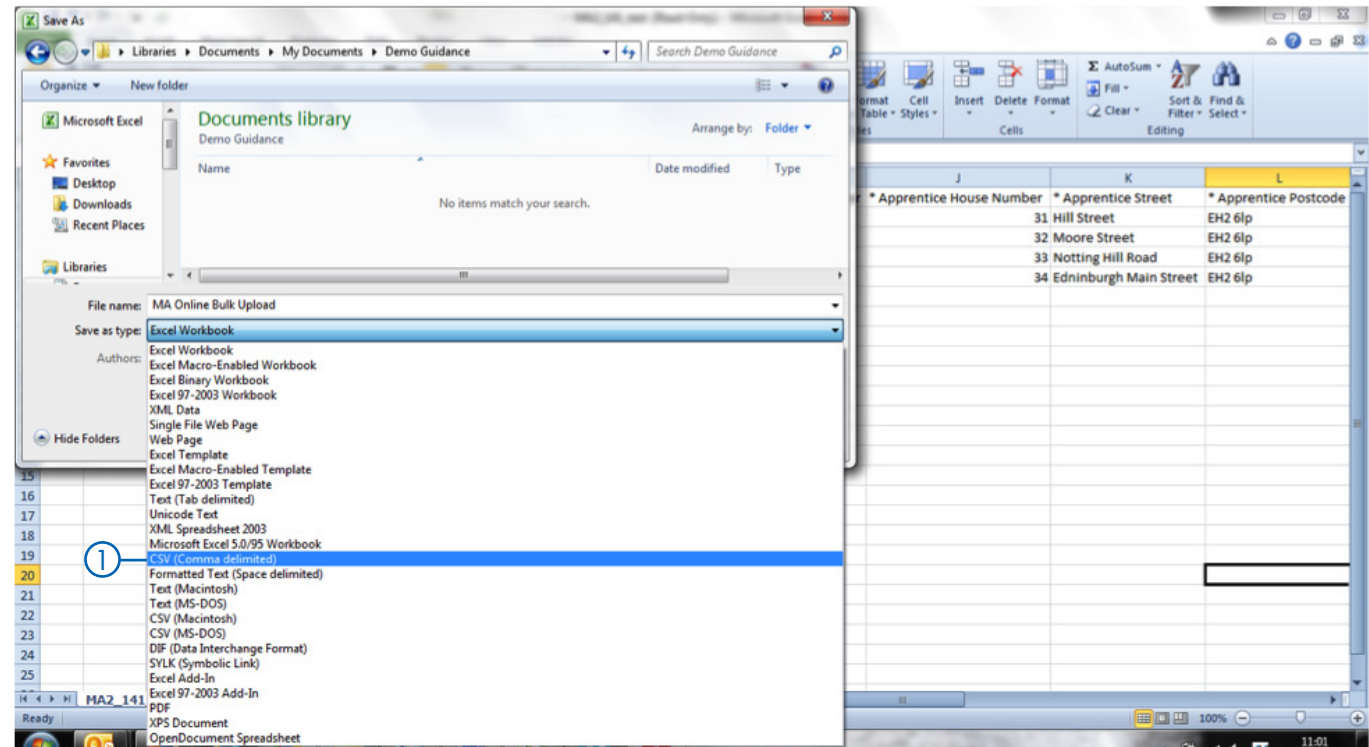
Pathway Code & Name

G9G1 23) Barbering

4

When you have completed all of the required fields on the spreadsheet and you are sure that all the apprentice names are correctly spelt, you will need to save the document as a **CSV Comma Delimited file**. To do this:

- Select the **Save As** option within Excel.
- Under the selection Save As you will see that a drop down menu appears. Select the **CSV Comma delimited** ① (you can see that there are several different CSV formats but only the comma delimited will work).
- Give the file a relevant filename and save to a suitable drive/directory/folder location.
- You will be asked if you want to keep the file in this format, select **Yes** ②.



Now the file is in the CSV file format, return to the **Bulk Upload page** ① of the MA Online 2 website.

- Select **Browse** ②, a pop up box will appear that will allow you to navigate to the location where you saved the CSV file. Once you have selected the correct file, click the **Open** button which will transfer the file path to the **Choose a File** field in MA Online 2 and then click the **Upload** button ③.
- The MA Online 2 system will upload and convert the information from the CSV file.
- Any records that **do not comply** to the requirements will be shown in a summary field ④ and the error will be highlighted in **red**.

PLEASE NOTE!

When there are issues with the file upload, none of the apprentice's records will be saved to the system. You will need to correct the errors and upload the whole file again.

Pending Registration (62)
Rejected Registration (1)
①
ment Pending (0)
Apprentices
Rejected (0)
Awaiting Certification (0)
Certificate Approved (0)
Logout

View Apprentices
Add Apprentice
Bulk Upload

Choose a file
Browse...
No file selected.
Upload

Download an example
[Good Example](#)
[Bad Example](#)

Download a template
[Excel\(XLS\) empty template](#)

Download guide
[Download the Bulk Upload user guide](#)

Framework
Barbering (Hairdressing and Beauty Industry Authority)
Framework Level
3
Pathway Code & Name
G9G1 23) Barbering
Pathway #
273

| Prefix | Gender* | Forename* | Surname* | Middle name | DOB* | Ethnic Group* | NI Number* | UniqueNr | Appr.House Number* | Appr.Street* | Appr. |
|--------|---------|-----------|----------|-------------|------------------|---------------|------------|----------|--------------------|----------------|-------|
| 10 | 1 | Lynsey | Bobson | McSmith | 10thFebruary1962 | 31 | JR401232D | | 12 | Hill Road | EH2 6 |
| 1 | | David | | Middle | 13021963 | 31 | JR401232D | UNIQNO | 2 | McGrove Street | EH2 6 |
| 2 | 5 | Claire | Kent | Rachael | 010219/8 | 33 | JR401222D | 1231231 | 20 | McGrove Street | G4 2C |

④
6 errors found. Please update CSV file and upload again.

Only when all of the spreadsheet data has been accepted by the system, and it is showing as green, will the uploaded data be saved onto the MA Online 2 system.

Now that the apprentices records have been created, you will need to search for each record to complete the additional components. This includes the framework information and uploading the evidence of achievement to the **Certification Evidence Tab**. This will need to be done before you submit a certificate claim. If you have loaded a large number of apprentices you may find it beneficial to download the MA Online 2 numbers for the apprentices records. In order to do this:

- Select the **Apprentices tab**.
- Enter the date that you uploaded the bulk upload file into both the Registration Date (from) and Registration Date (to) and select **Search**.
- The system will then show all apprentices loaded that day. You can then extend the amount of apprentices per page up to 100 and either export all or work your way through the list. If you choose to **export all**, the system will create a file that you can open in excel and displays the MA Online 2 number for each apprentice.

REMEMBER!

If using the Bulk Upload facility the system will NOT be able to pick up on duplicate apprentice records. Therefore it is important that you check you are not loading apprentices twice.

Pending Registration (52) Rejected Registration (1) Payment Pending (0) Apprentices Rejected (0) Awaiting Certification (0) Certificate Approved (0) Logout

View Apprentices Add Apprentice Bulk Upload

Bulk upload

CSV File

Choose a file Browse No file selected. Upload

Templates

Download a template Excel(XLS) empty template

Sample Templates

Download an example Good Example Bad Example

User Guide

Download guide Download the Bulk Upload user guide

Framework and Pathway ID Helper

Framework Barbering (Hairdressing and Beauty Industry Authority)

Framework Level 3

Pathway Code & Name G9G1 23) Barbering Pathway # 273

| Prefix | Gender* | Forename* | Surname* | Middle name | DOB* | Ethnic Group* | NI Number* | UniqueNr | Appr.House Number* | Appr.Street* | Appr.Postcode* |
|------------------|---------|-----------|----------|-------------|------|---------------|------------|----------|--------------------|--------------|----------------|
| No errors found. | | | | | | | | | | | |
| 20 items saved. | | | | | | | | | | | |

PLEASE NOTE

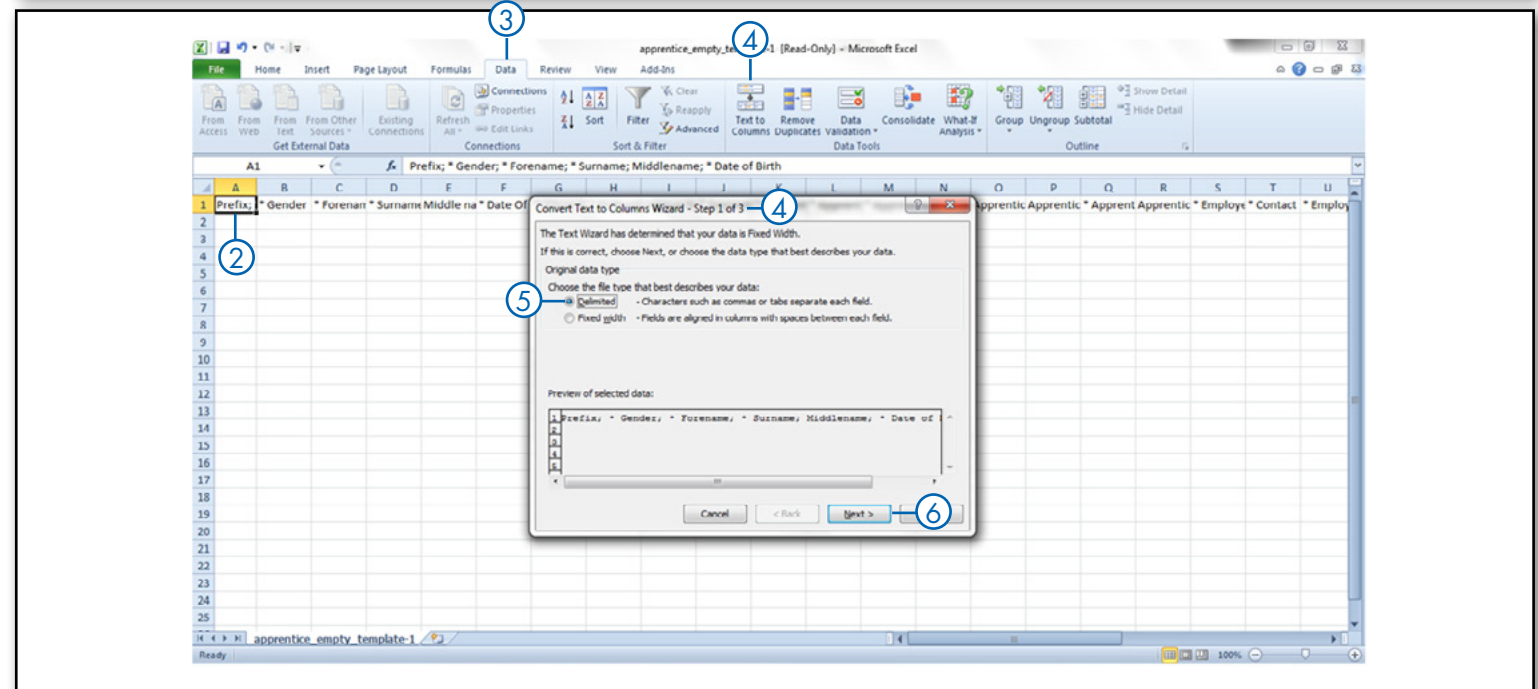
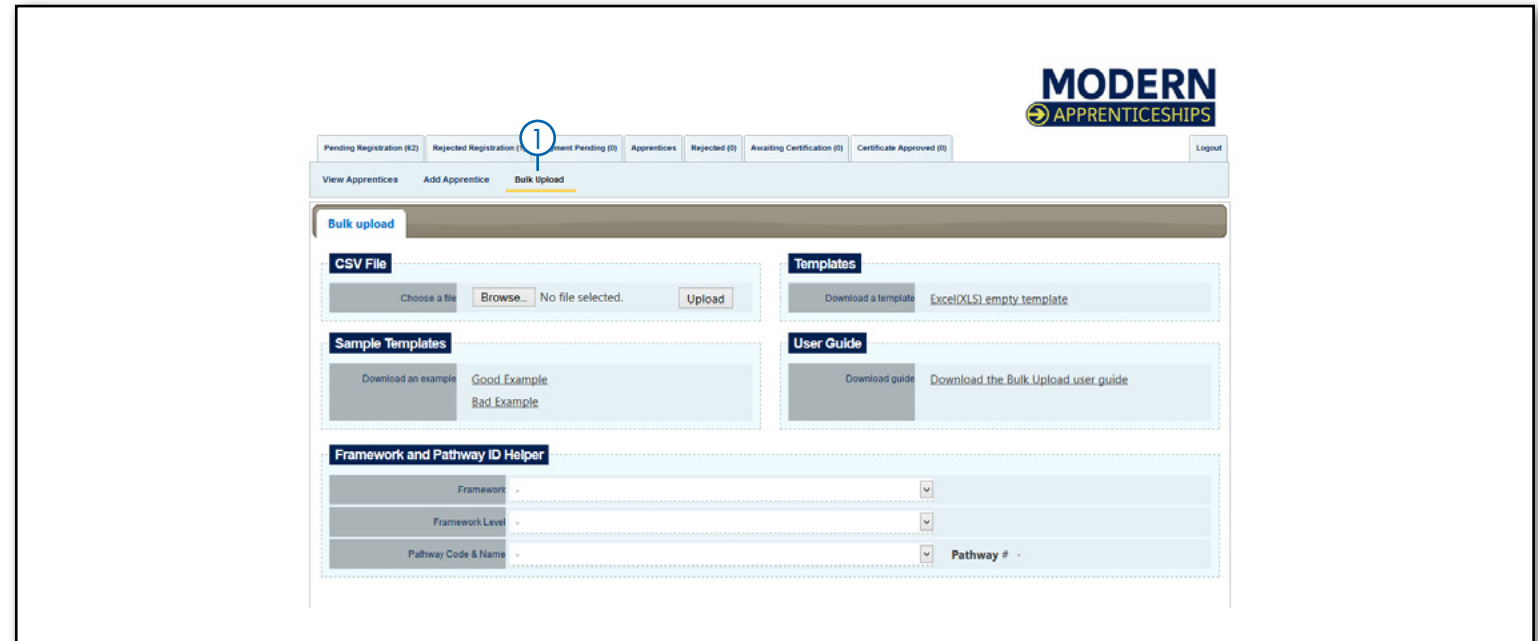
If you wish to use the CSV method for Bulk Upload, you will need to **contact the MA Online Support team** for the CSV file.

Once you have the file you will be able to follow this guidance on how to populate the CSV file.

- There are examples of good and bad completion on the **Bulk Upload page** ①.

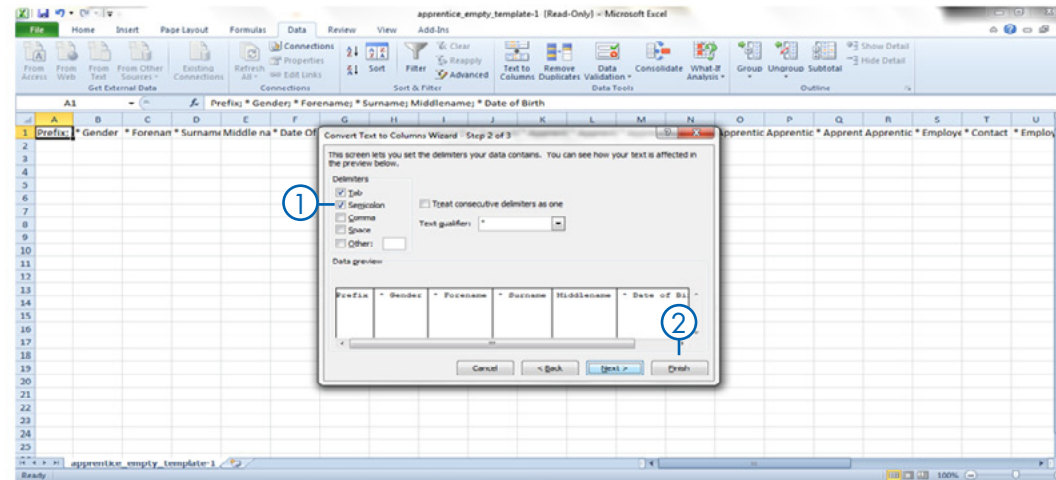
Once you have the CSV file you will notice that all of the column headings appear in the one cell A1. These need to be separated so that the headings each have their own column enabling the MA Online 2 system to import the data. To separate the headings:

- Select cell A1** ② and go to the **Data tab** ③
- Within the **Data tab** you will see the option **Text to Columns**, by selecting this option the **Text to Columns Wizard** ④ will open. Within the wizard pop up select the option **Delimited** ⑤ followed by **Next** ⑥



You will then see the option to set the Delimiters (the column headings). By ticking the selection **Semicolon** ① the wizard will automatically set the headings into columns which you will be able to see in the preview box, select **Finish** ②. This will then separate the columns and you are now able to fill in the apprentices details that you would like to load.

- There are some fields that are marked with an * this is because they are **mandatory requirements**. When you open the spreadsheet you will see the following fields ③
- When all the data is entered, give the file a relevant filename and **Save** to a suitable drive/directory/ folder location.



| ③ APPRENTICE DETAILS | APPRENTICE INFORMATION | EMPLOYER INFORMATION | ADDITIONAL INFORMATION | FRAMEWORK INFORMATION |
|-----------------------------|-------------------------------------|------------------------|---------------------------------|-----------------------|
| Prefix | Apprentice House Number* | Employer Name* | Training Agreement Held* | Pathway* |
| Gender* | Apprentice Street* | Contact * | Asylum Seeker | |
| Forename* | Apprentice Postcode* | Employer Size* | Disability | |
| Middlename | Apprentice Town* | Contact Position | Any mental/physical impairment | |
| Surname* | Apprentice Country* | Employer House Number* | ESOL needs | |
| Date of Birth* (DD/MM/YYYY) | Apprentice Email | Employer Street* | Unemployed at start of training | |
| Ethnic Origin* | Apprentice Phone | Employer Postcode* | Apprentice Publicity Funded* | |
| NI Number* | Apprentice Start Date* (DD/MM/YYYY) | Employer Town* | PO Number | |
| Unique Number | Apprentice End Date* (DD/MM/YYYY) | Employer Email | Notes | |
| | | Employer Phone* | | |
| | | Employer Sector* | | |

The **Pathway column** in the spread sheet matches those pathways within the MA frameworks stored on MA Online 2. In order for the system to identify the pathway due to be completed by the apprentice you need to use the correct code.

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- Select the **Framework level** ③
- Followed by the **Pathway Code and Name** ④ The number that you need to enter into the spread sheet are then displayed to the right of the **Pathway Code and Name** ⑤

As you can see here in the example the pathway code is: 273. When you upload the file to MA Online the framework and pathway will be populated.

Pending Registration (53)
Rejected Registration (1)
Payment Pending (0)
Apprentices
Rejected (1)
Awaiting Certification (0)
Certificate Approved (1)

Logout

View Apprentices
Add Apprentice
Bulk Upload

Bulk upload

CSV File

Choose a file
Browse...
No file selected.
Upload

Sample Templates

Download an example
[Good Example](#)
[Bad Example](#)

Templates

Download a template
[Excel\(XLS\) empty template](#)

User Guide

Download guide
[Download the Bulk Upload user guide](#)

Framework and Pathway ID Helper

Framework
Barbering (Hairdressing and Beauty Industry Authority)
2

Framework Level
3
3

Pathway Code & Name
G9G1 23) Barbering
Pathway # 273
4

- Now the file is in the CSV file format and complete, return to the **Bulk Upload** ① page of the MA Online 2 website.
- Select **Browse** ②, a pop up box will appear that will allow you to navigate to the location where you saved the CSV file. Once you have selected the correct file, click the open button which will transfer the file path to the **Choose a File** field in MA Online 2 and then click the **Upload button** ③
- The MA Online 2 system will upload and convert the information from the CSV file.
- Any records that **do not comply** to the requirements will be shown in a summary field ④ and the error will be highlighted in **red**. Only when all of the spreadsheet data has been accepted by the system and showing as **green** ⑤, will the uploaded data be saved onto the MA Online 2 system.

REMEMBER!

Please note that when there are issues with the file upload, none of the apprentice's records will be saved to the system. You will need to correct the errors and upload the whole file again.

Now that the apprentices records have been created, you will need to search for each record to complete the additional components. This includes the framework information and uploading the evidence of achievement to the **Certification Evidence Tab**. This will need to be done before you are able to submit a certificate claim using MA Online. If you have loaded a large number of apprentices you may find it beneficial to download the MA Online numbers for the apprentices records. In order to do this:

- Select the **Apprentices tab**.
- Enter the date that you uploaded the bulk upload file into both the Registration Date (from) and Registration Date (to) and select **Search**. The system will then show all apprentices loaded that day.
- You can then extend the amount of apprentices per page up to 100 and either export all or work your way through the list. If you choose to **export all**, the system will create a file that you can open in excel and displays the MA Online 2 number for each apprentice.
- If the MIS that you use does not currently have an export process to extract the data in a format that is suitable for uploading to MA Online 2, then **please contact the Federation** and we may be able to facilitate this by working with individual software suppliers.

Hello Masana Ikeshima!
You are logged in to ConstructionSkills

MODERN
APPRENTICESHIPS

Pending Registration (82) Rejected Registration (1) Payment Pending (0) Apprentices Rejected (0) Awaiting Certification (0) Certificate Approved (0) Logout

View Apprentices Add Apprentice Bulk Upload

Search

Framework Status Reference number Keyword

Date of Birth (from) Date of Birth (to) Registration Date (from) Registration Date (to) Certification Date (from) Certification Date (to)

Select All DeSelect All Show deleted Print view Export all

| Active | NI Number | Forename | Surname | DOB | Status | Framework | Updated | Rejected | Locked |
|--------|-----------|----------|----------|------------|----------------------|----------------------------|------------|----------|--------|
| ✓ | AB123456C | Linda | Tulip | 13-02-1985 | Pending Registration | Construction Building (Tes | 06-12-2013 | | |
| ✓ | AB123456C | Sheila | Aplin | 12-02-1985 | Pending Registration | Construction Building (Tes | 06-12-2013 | | |
| ✓ | AB123456C | Eleanor | Rose | 11-02-1985 | Pending Registration | Construction Building (Tes | 06-12-2013 | | |
| ✓ | AB123456C | Enid | Blush | 10-02-1985 | Pending Registration | Construction Building (Tes | 06-12-2013 | | |
| ✓ | AB123456C | Petulia | Hobbs | 09-02-1985 | Pending Registration | Construction Building (Tes | 06-12-2013 | | |
| ✓ | AB123456C | Maggie | Queen | 08-02-1985 | Pending Registration | Construction Building (Tes | 06-12-2013 | | |
| ✓ | AB123456C | Harry | King | 07-02-1985 | Pending Registration | Construction (2008) | 06-12-2013 | | |
| ✓ | AB123456C | Jack | Penny | 06-02-1985 | Pending Registration | Construction (2008) | 06-12-2013 | | |
| ✓ | AB123456C | Ben | McCay | 05-02-1985 | Pending Registration | Construction (2008) | 06-12-2013 | | |
| ✓ | AB123456C | Bob | Quinn | 04-02-1985 | Pending Registration | Construction (2008) | 06-12-2013 | | |
| ✓ | AB123456C | Fred | Rimmer | 03-02-1985 | Pending Registration | Construction (2008) | 06-12-2013 | | |
| ✓ | AB123456C | Bill | Clarkson | 03-02-1985 | Pending Registration | Construction (2008) | 06-12-2013 | | |
| ✓ | AB123456C | Jim | Hammond | 02-02-1985 | Pending Registration | Construction (2008) | 06-12-2013 | | |
| ✓ | AB123456C | John | Evans | 01-02-1985 | Pending Registration | Construction (2008) | 06-12-2013 | | |
| ✓ | AB654321C | William | Thaw | 05-06-1990 | Pending Registration | Construction (2008) | 06-12-2013 | | |

15 Page 1 of 6 Displaying: 1 to 15 of 86 items.

Top | Contact Us | Users | Organisation details | Notifications (2) |

Generated in 0.1424(s), memory used: 5.82MB, online: 1

If you experience problems while using the system, the MA Online support team are available to help:

Telephone: 0300 303 4444 **E-mail:** maonline@fisss.org

