

USER MANUAL

BULK UPLOAD

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FEBRUARY 2014

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

Apprenticeship Certification
Wales

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 and employer information into an Excel or CSV format spreadsheet. This information can then be uploaded to the system which will create the apprentices records within ACW. Don't forget that once the records have been created on ACW, you will still need to access them and complete the apprentices framework details and load the certification evidence.

There are two ways that the spread-sheet can be completed; either manually enter the required information or an automated download process that has been developed by some of the suppliers of the commonly used training provider management information systems such as Maytas and PICS.

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 www.acwcerts.co.uk

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.

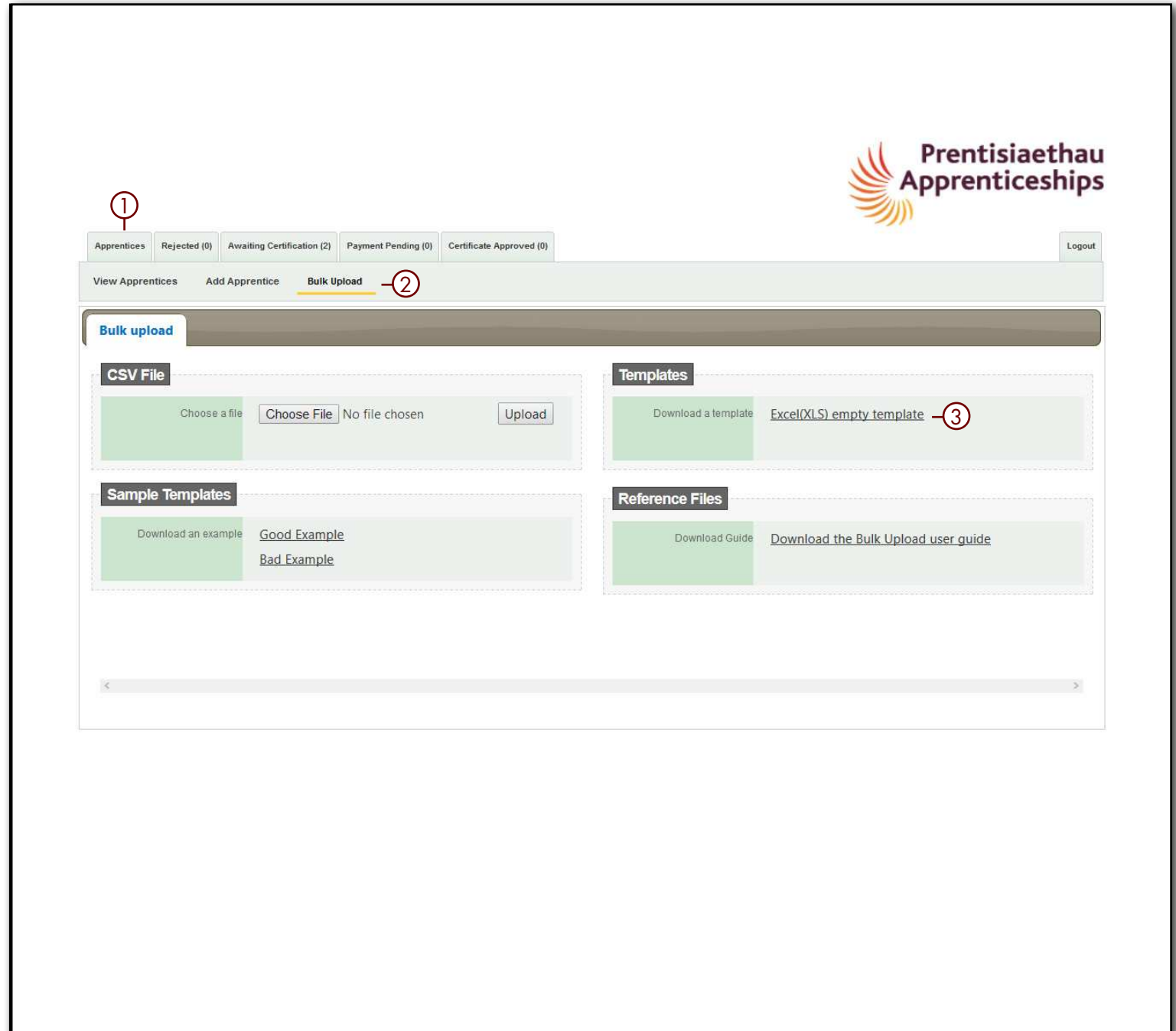
There are two file formats that are available for the Bulk Upload facility. The **Excel** file can be found on the ACW website ③, this is the file that we recommend to use. There is also a **CSV** file available from the ACW support team and if you wish to use this format, please contact:

Telephone: 0844 326 7565

E-mail: acw@fisss.org

REMEMBER!

Both file formats require codes to be entered for some of the fields, this is because the corresponding field on ACW has a drop down menu that requires a selection to be made and each of the available selections has a corresponding, identifying code in the underlying ACW database.



FIELD	SELECTION	CODE
PREFIX	Mr	1
	Mrs	2
	Ms	3
	Miss	4
GENDER	Female	1
	Male	2
ETHNIC GROUP	White	11
	Black - Caribbean	21
	Black - African	22
	Other Black background	29
	Asian – Indian	31
	Asian – Pakistani	32
	Asian – Bangladeshi	33
	Chinese	34
	Other Asian Background	39
	Mixed – White and Black Caribbean	41
	Mixed – White and Black African	42
	Mixed – White and Asian	43
	Other Mixed background	49
	Arab	50
	Other Ethnic background	60
	Information refused	90
Not known	99	
EMPLOYER SIZE	0-10	1
	11-50	2
	51-250	3
	250+	4
APPRENTICE COUNTRY	UK	232

The spreadsheet requires **all** mandatory fields to be completed for the Apprentice and Employer details. 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 so and displays correctly within ACW.

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

FIELD	SELECTION	CODE
APPRENTICE FUNDING	No	0
	Yes	1
TRAINING AGREEMENT HELD	Yes	1
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

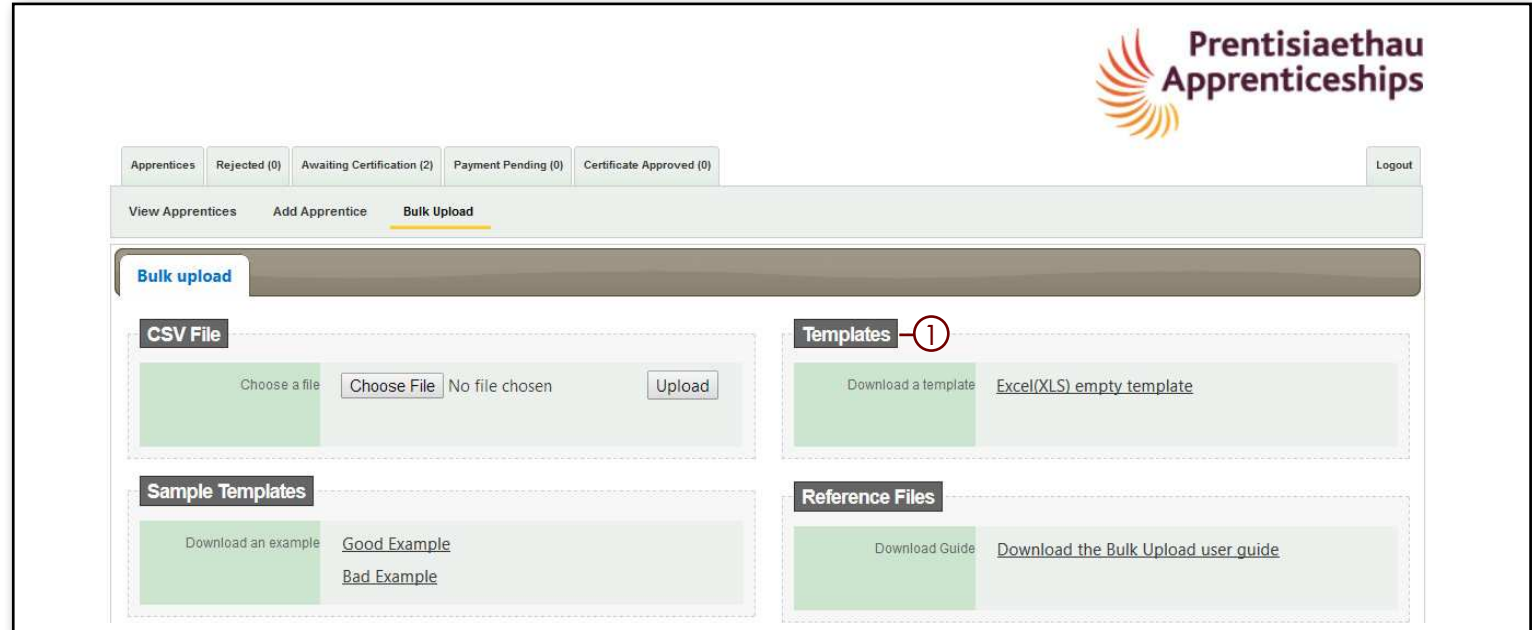
When you are on the **Bulk Upload** page you are able to download the Excel (XLS) empty template ①. You can either save the file or open the document. It will open within Excel.

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.

There are examples of good and bad completion on the Bulk Upload webpage.

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 ②.

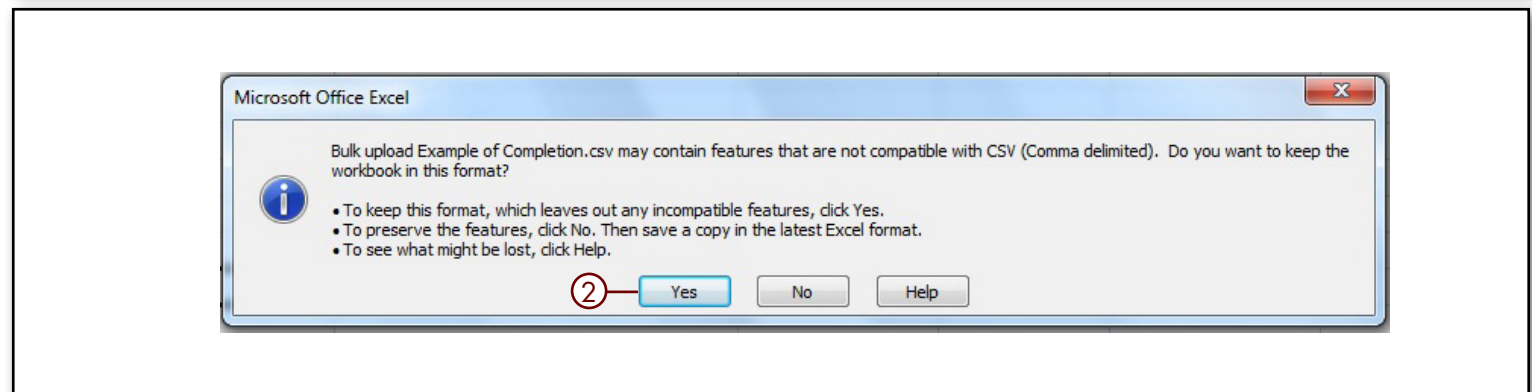
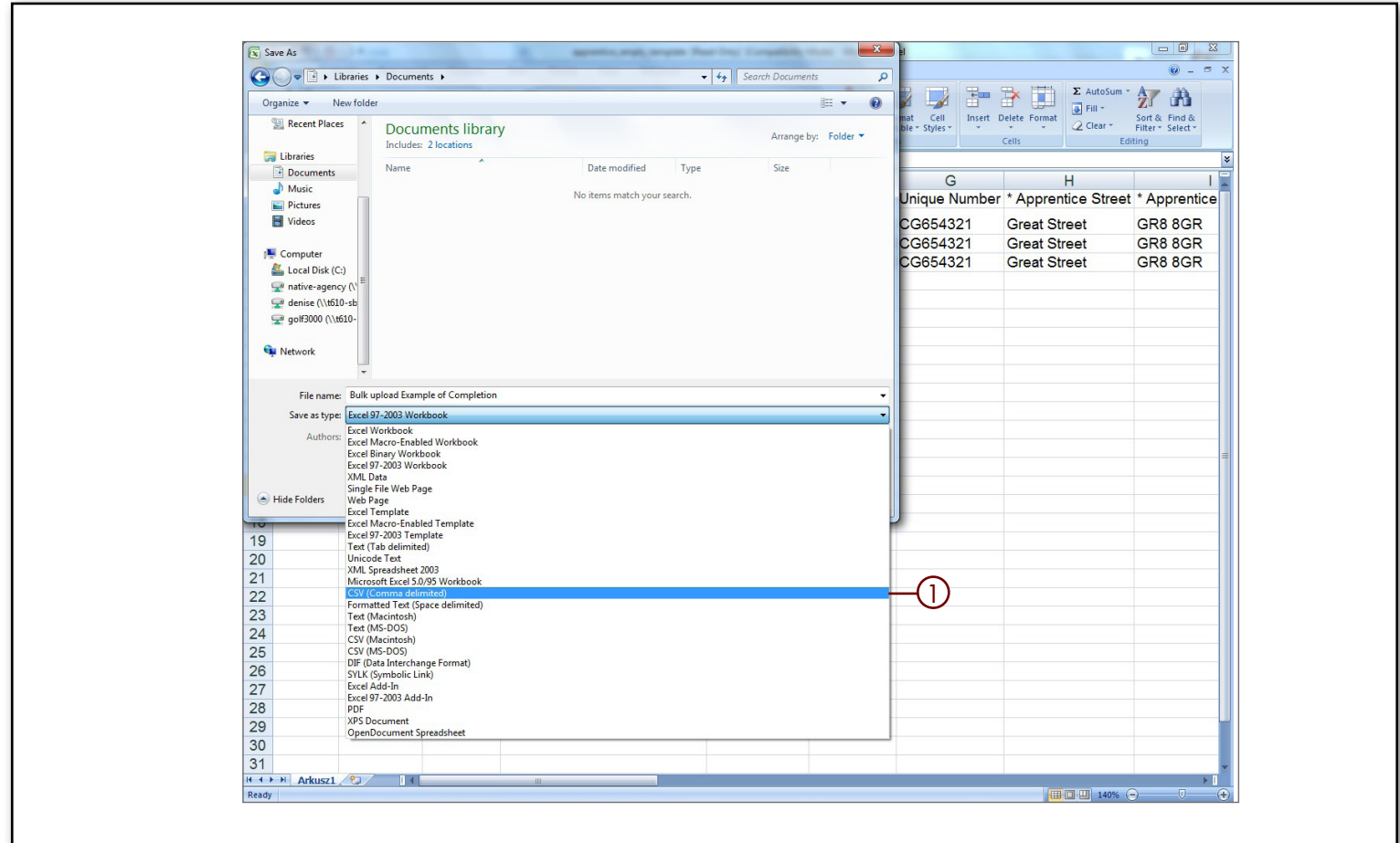


②

APPRENTICE DETAILS	APPRENTICE INFORMATION	EMPLOYER INFORMATION	ADDITIONAL INFORMATION
Prefix	Apprentice Street*	Employer Name*	Purchase Order Number
Gender*	Apprentice Postcode*	Contact *	Apprentice Funding*
Forename*	Apprentice Town*	Employer Size*	Cost Centre
Middlename	Apprentice Country*	Contact Position	Notes
Surname*	Apprentice Email	Employer Street*	Training Agreement Held*
Date of Birth* (DD/MM/YYYY)	Apprentice Phone	Employer Postcode*	
Ethnic Origin*	Apprentice Start Date* (DD/MM/YYYY)	Employer Town*	
NI Number*		Employer Email	
Unique Number		Employer Phone*	
		Employer Sector	

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 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** ① page of the ACW website.
- Select **Choose File** 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 ACW ③ and then click the **Upload** button ④.
- The ACW 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 ⑤ and the error will be highlighted in **red**.



Apprentices Rejected (0) Awaiting Certification (2) Payment Pending (0) Certificate Approved (0) Logout

View Apprentices Add Apprentice **Bulk Upload** ①

Bulk upload

CSV File ② ③ ④
 Choose a file Choose File No file chosen Upload

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

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

Reference Files
 Download Guide [Download the Bulk Upload user guide](#)

Prefix	Gender*	Forename*	Surname*	Middle name	DOB*	Ethnic Group*	NI Number*	UniqueNr	Appr.Street*	Appr.Postcode*	Appr.Tov
10	1	Lynsey	Bobson	McSmith	01101920	31	JR401232D		12	Hill Road	EH2 6LP
1		David	Smith	Middle	13021963	31	JR401232D	UNIQNO	2	McGrove Street	EH2 6LP
2	5	Claire	Kent	Rachael	01021978	33	JR401222D	1231231	20	McGrove Street	G4 2QA
1	1	Nicholas			01021993	31	AB123456C	CG654321	691	Buckingham Road	ST6 3BR

36 errors found. Please update CSV file and upload again.

⑤

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.


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 ACWsystem.

- Now that the apprentices records have been created, you will need to search and go to individual records to add the framework information and upload the required 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 ACW reference numbers 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 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 you will need to do this for every page and the system will create a file that you can open in excel which displays the ACW number for each apprentice.



Apprentices
Rejected (0)
Awaiting Certification (2)
Payment Pending (0)
Certificate Approved (0)
Logout

View Apprentices
Add Apprentice
Bulk Upload

CSV File

Choose a file No file chosen

Templates

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

Sample Templates

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

Reference Files

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

Prefix	Gender*	Forename*	Surname*	Middle name	DOB*	Ethnic Group*	NI Number*	UniqueNr	Appr.Street*	Appr.Postcode*	Appr.Town*
No errors found.											
3 items saved.											

PLEASE NOTE!

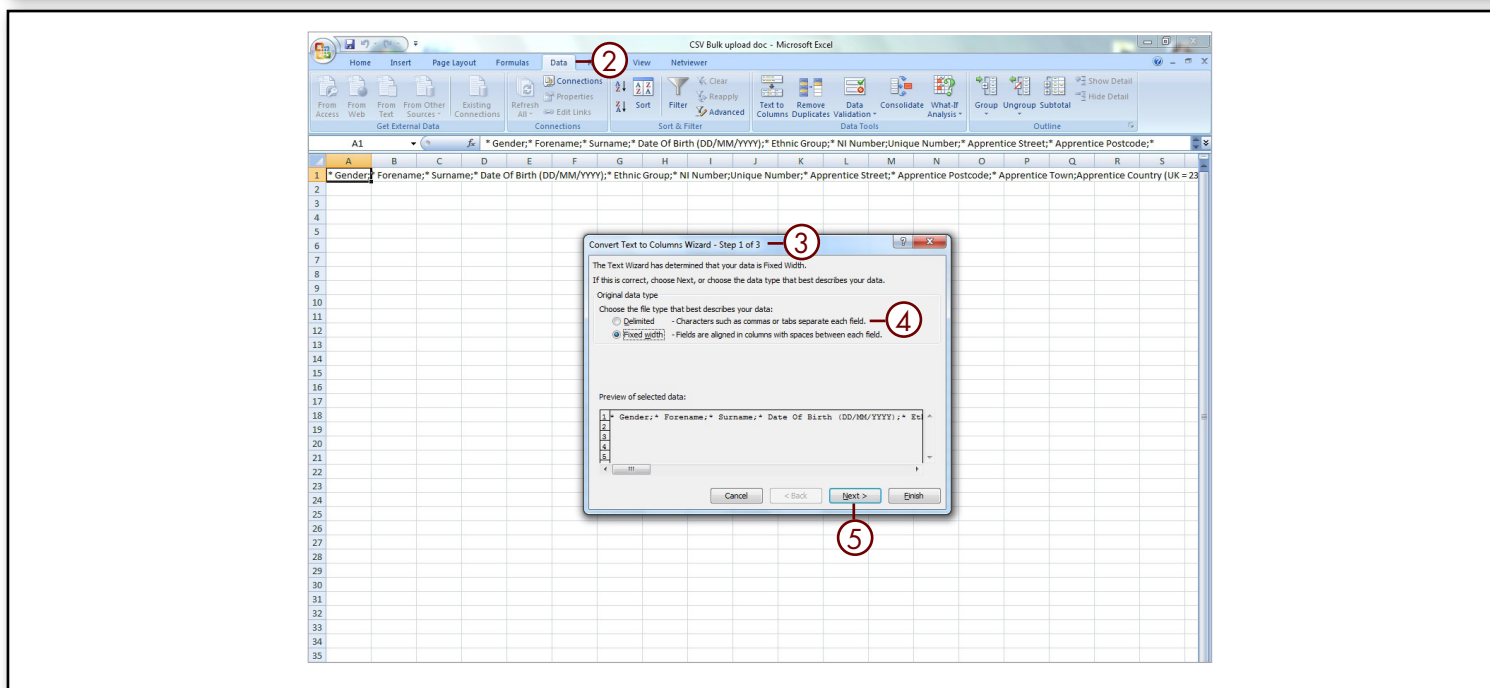
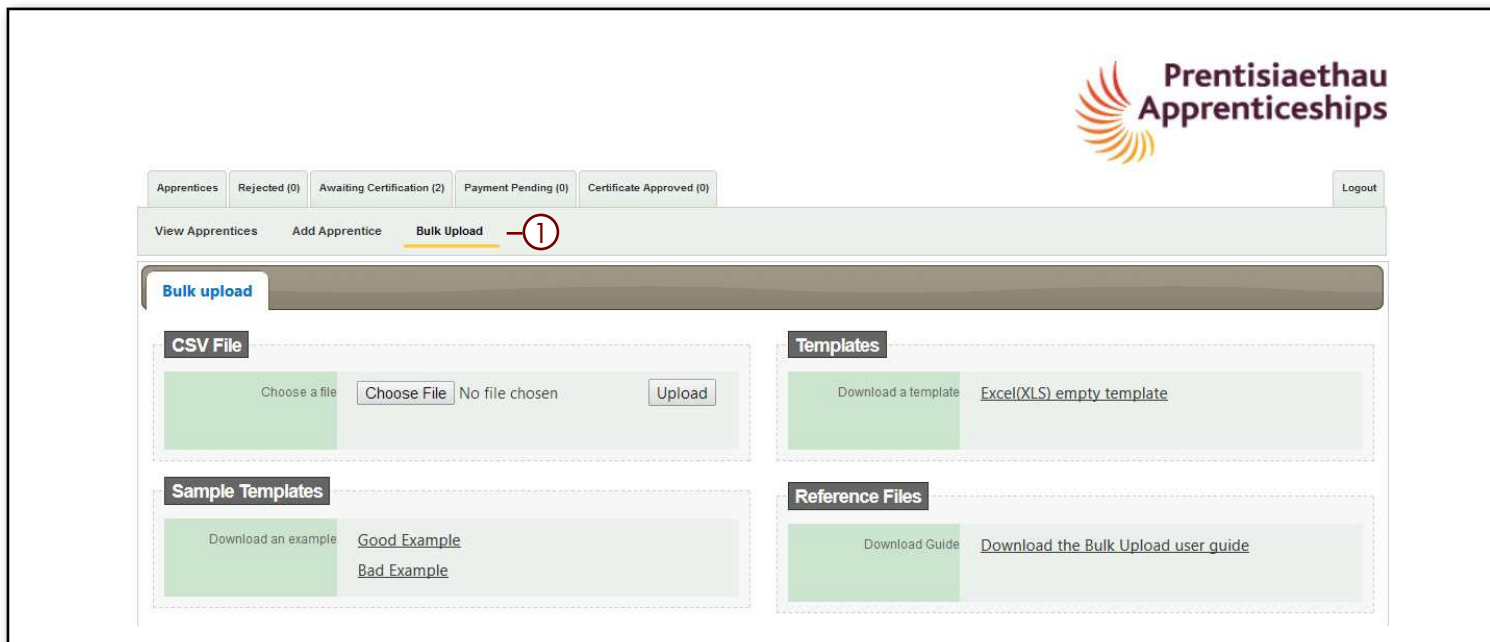
If using the Bulk Upload facility the system will NOT be able to pick up on duplicate apprentice records. Therefore it is important that you check you are not loading apprentices twice.

Please note that if you wish to use this method for Bulk Upload you will need to contact the ACWE 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.

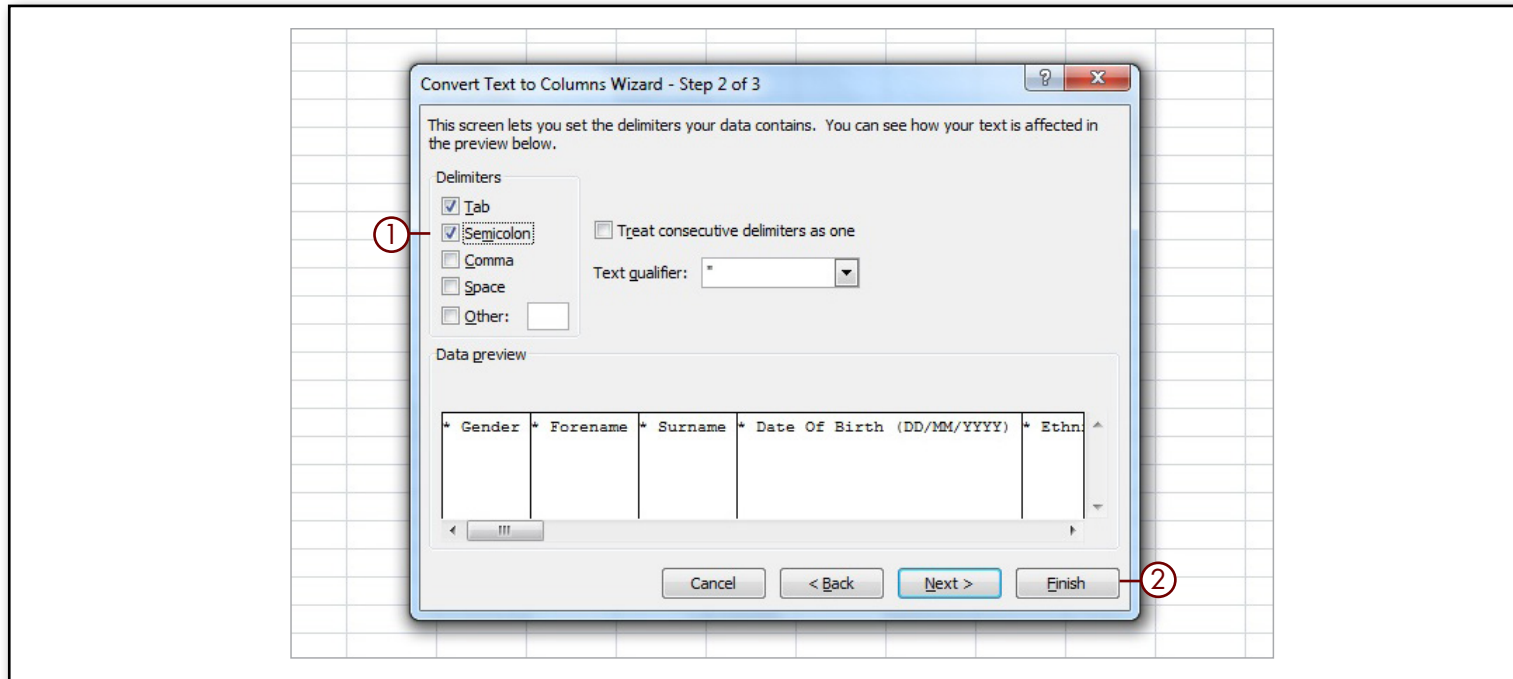
- There are examples of good and bad completion on the **Bulk Upload page ①**.

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 ACW system to import the data. To separate the headings:

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



- 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 INFOMATION	EMPLOYER INFORMATION	ADDITIONAL INFORMATION
Prefix	Apprentice Street*	Employer Name*	Purchase Order Number
Gender*	Apprentice Postcode*	Contact *	Apprentice Funding*
Forename*	Apprentice Town*	Employer Size*	Cost Centre
Middlename	Apprentice Country*	Contact Position	Notes
Surname*	Apprentice Email	Employer Street*	Training Agreement Held*
Date of Birth* (DD/MM/YYYY)	Apprentice phone	Employer Postcode*	
Ethnic Origin*	Apprentice Start Date* (DD/MM/YYYY)	Employer Town*	
NI Number*		Employer Email	
Unique Number		Employer Phone*	
		Employer Sector	

- Now the file is in the CSV file format is correctly setup, return to the **Bulk Upload** ① page of the ACW website.
- Select **Choose File** 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 ③ in ACW and then click the **Upload** button ④.
- The ACW 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 ⑤ 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 ACW system.

Prentisiaethau Apprenticeships

Apprentices Rejected (0) Awaiting Certification (2) Payment Pending (0) Certificate Approved (0) Logout

View Apprentices Add Apprentice Bulk Upload ①

Bulk upload

CSV File ② ③ ④

Choose a file Choose File No file chosen Upload

Templates

Download a template Excel(XLS) empty template

Sample Templates

Download an example Good Example Bad Example

Reference Files

Download Guide Download the Bulk Upload user guide

Prefix	Gender*	Forename*	Surname*	Middle name	DOB*	Ethnic Group*	NI Number*	UniqueNr	Appr.Street*	Appr.Postcode*	Appr.Town
10	1	Lynsey	Bobson	McSmith	01101920	31	JR401232D		12	Hill Road	EH2 6LP
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2	5	Claire	Kent	Rachael	01021978	33	JR401222D	1231231	20	McGrove Street	G4 2QA
1	1	Nicholas			01021993	31	AB123456C	CG654321	691	Buckingham Road	ST6 3BR

36 errors found. Please update CSV file and upload again. ⑤

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.

Prentisiaethau Apprenticeships

Apprentices Rejected (0) Awaiting Certification (2) Payment Pending (0) Certificate Approved (0) Logout

View Apprentices Add Apprentice Bulk Upload

Bulk upload

CSV File

Choose a file Choose File No file chosen Upload

Templates

Download a template Excel(XLS) empty template

Sample Templates

Download an example Good Example Bad Example

Reference Files

Download Guide Download the Bulk Upload user guide

Prefix	Gender*	Forename*	Surname*	Middle name	DOB*	Ethnic Group*	NI Number*	UniqueNr	Appr.Street*	Appr.Postcode*	Appr.Town*
No errors found.											
3 items saved. ⑤											

- Now that the apprentices records have been created, you will need to search and go to individual records to add the framework information and use the certification evidence tab to upload the required evidence of achievement. **This will need to be done before you are able to submit a certificate claim using ACW.**

If you have loaded a large number of apprentices you may find it beneficial to download the ACW 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 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 you will need to do this for every page and the system will create a file that you can open in excel which displays the ACW number for each apprentice.

REMEMBER!

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 ACW) then please contact the Federation as we may be able to facilitate this by working with individual software suppliers.

The screenshot shows the Prentisiaethau Apprenticeships user interface. At the top, it says "Hello Masana Ikeshima! You are logged in to ConstructionSkills". The logo for Prentisiaethau Apprenticeships is in the top right. Below the header, there are navigation tabs: Apprentices, Rejected (0), Awaiting Certification (2), Payment Pending (0), and Certificate Approved (0). A "Logout" button is also present. The main menu includes "View Apprentices", "Add Apprentice", and "Bulk Upload".

A search section is visible with the following fields: Framework (dropdown menu), Status (dropdown menu with "Any" selected), Reference number, and Keyword. Below these are date range filters for Date of Birth (from/to), Registration Date (from/to), and Certification Date (from/to), along with a "Search" button.

Below the search section is a table of apprentices. The table has columns for Active, NI Number, Forename, Surname, DOB, Status, Framework, Days Elapsed, Reject, and Locked. The table contains 15 rows of data, with the first row highlighted in green. The status of the apprentices varies, including "Certificate authorised", "Certificate printed", and "Pending certification".

At the bottom of the table, there are controls for "Select All", "DeSelect All", "Show deleted", "Print view", and "Export all". Below the table, there are pagination controls showing "Page 1 of 13" and "Displaying: 1 to 15 of 187 items".

At the very bottom of the page, there is a footer with navigation links: "Top", "Contact Us", "Users", "Organisation details", and "Notifications: 6 Unread". On the right side of the footer, it says "Generated in 0.4361(s), memory used: 6.34MB, online: 3".

Active	NI Number	Forename	Surname	DOB	Status	Framework	Days Elapsed	Reject	Locked
✓	JR203212D	John	Norris	24-01-1985	Certificate authorised	Marketing & Communications (BP	3		
✓	JR401232D	Dave3	Fion4	11-12-1995	Certificate printed	Marketing & Communications (BP	0		
✓	JR404040D	Mike	Shima	07-04-1984	Pending certification	Construction Specialist (Wales)	0		
✓	JR401232D	Masana	Ikeshima	19-04-1996	Pending certification	Construction Civil Engineering (W	0		
✓	JR401232D	Dave5	Fion6	13-12-1995	Certificate printed	Marketing & Communications (BP	0		
✓	JR401232D	Dave6	Fion7	14-12-1995	Certificate printed	Marketing & Communications (BP	0		
✓	JR401232D	Dave7	Fion8	15-12-1995	Certificate printed	Marketing & Communications (BP	0		
✓	JR401232D	Dave4	Fion5	12-12-1995	Certificate printed	Marketing & Communications (BP	0		
✓	JR401232D	Dave8	Fion9	16-12-1995	Certificate printed	Construction Technical and Profes	0		
✓	JR401232D	Dave126	Fion127	12-04-1996	Certificate printed	Construction Building (Wales)	0		
✓	JR401232D	Dave9	Fion10	17-12-1995	Certificate printed	Marketing & Communications (BP	0		
✓	JR401232D	Arweiny	test	25-01-1996	Certificate printed	Construction Building (Wales)	0		
✓	JR401232D	Dave1	Fion2	09-12-1995	Certificate printed	Construction Technical and Profes	0		
✓	JR401232D	Dave2	Fion3	10-12-1995	Certificate printed	Construction Technical and Profes	0		
✓	JR401232D	Dave129	Fion130	15-04-1996	Certificate printed	Construction Technical and Profes	0		

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

Telephone: 0844 326 7565 **E-mail:** acw@fisss.org

Apprenticeship Certification
Wales