

USER MANUAL

BULK UPLOAD

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JUNE 2013

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

Apprenticeship Certificates
England

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 ACE. Don't forget that once the records have been created on ACE, 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.acecerts.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 ACE website ③, this is the file that we recommend to use. There is also a **CSV** file available from the ACE support team and if you wish to use this format, please contact:

Telephone: 0844 573 2560

E-mail: ace@fisss.org

REMEMBER!

Both file formats require codes to be entered for some of the fields, this is because the corresponding field on ACE 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 ACE database.

The screenshot shows the 'Apprenticeships' website interface. At the top right is the 'Apprenticeships' logo. Below it is a navigation bar with tabs: 'Bodies', 'Centres', 'Apprentices' (marked with a red circle ①), 'Frameworks', 'Certificates', and 'Awarding Bodies'. To the right of these tabs are 'Helpdesk' and 'Logout' links. Below the navigation bar is a secondary bar with 'View Apprentices', 'Add Apprentice', and 'Bulk Upload' (marked with a red circle ②). The main content area is titled 'Bulk upload' and contains four sections: 'CSV File' with a 'Choose a file' input and 'Browse...' and 'Upload' buttons; 'Templates' (marked with a red circle ③) with a 'Download a template' link and 'Excel(XLS) empty template'; 'Sample Templates' with 'Download an example' links for 'Good Example' and 'Bad Example'; and 'User Guide' with a 'Download the csv guide' link and 'Download bulk upload user guide'.

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 that can be converted by the system so that it displays correctly within ACE.

The table to the right details those fields that require a code and what the code is for each possible selection.

FIELD	SELECTION	CODE
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
APPRENTICE COUNTRY	UK	232

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.

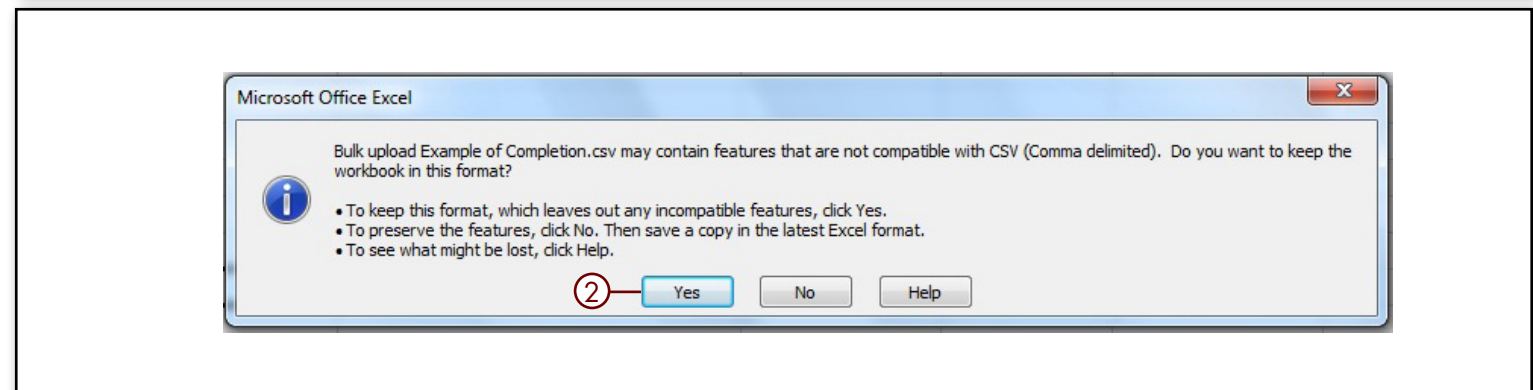
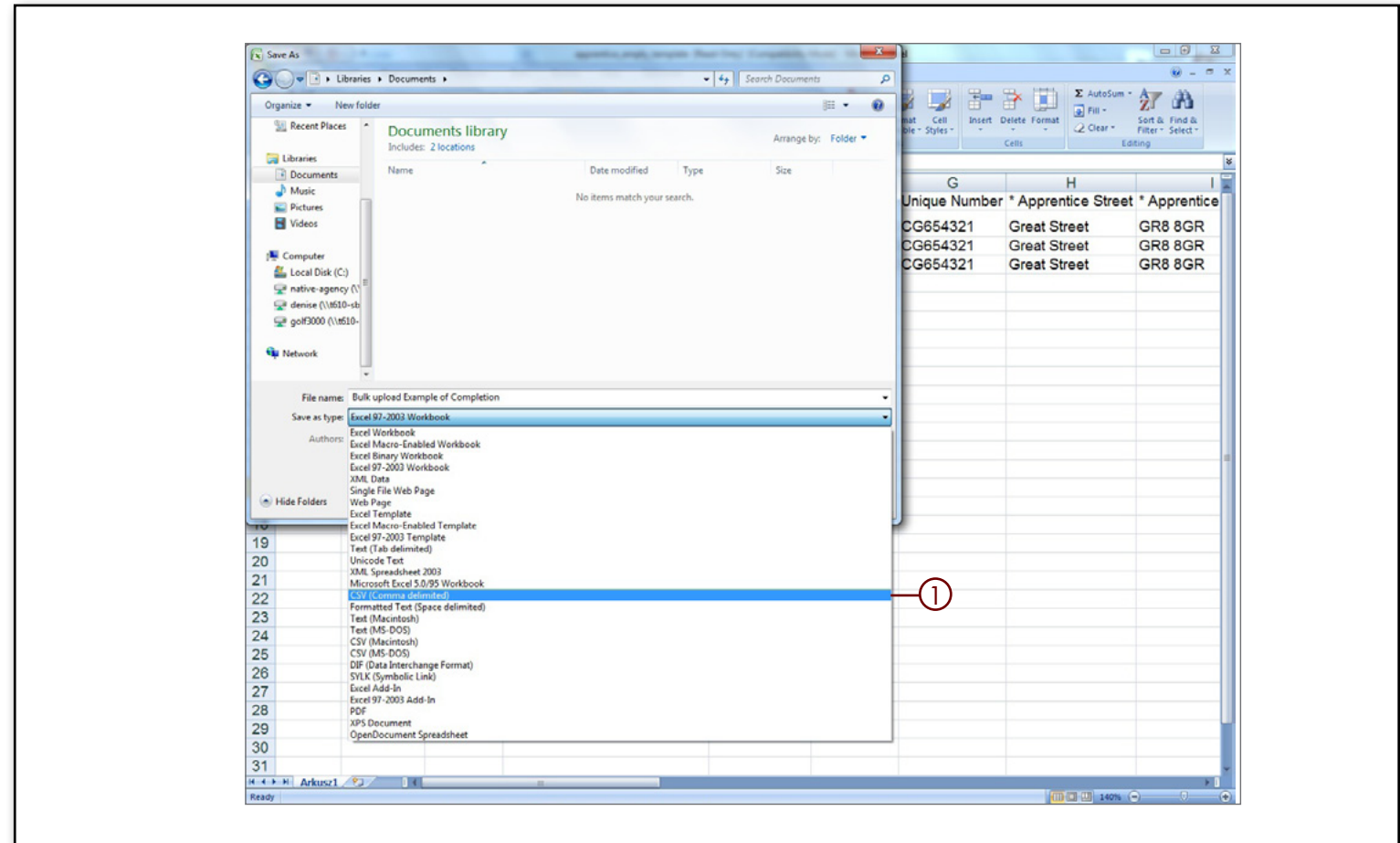
There are examples of good and bad completion on the Bulk Upload webpage.

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
Gender*	Apprentice Street*	Employer Name*	Purchase Order Number
Date of Birth* (DD/MM/YYYY)	Apprentice Postcode*	Contact *	Awarding Body Number
Ethnic Origin*	Apprentice Town*	Employer Size*	
NI Number*	Apprentice Country*	Contact Posistion	
	Apprentice Email	Employer Street*	
	Apprentice phone	Employer Town*	
	Apprentice Satrt Date* (DD/MM/YYYY)	Employer Email	
	Apprentice Completion Date* (DD/MM/YYYY)	Employer Phone*	

- 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).
- You will be asked if you want to keep the file in this format, select **Yes** ②.
- Give the file a relevant filename and save to a suitable drive/directory/folder location.



- Now the file is in the CSV file format, return to the **Bulk Upload** ① page of the ACE 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 ACE and then click the **Upload** button ③.
- The ACE system will upload and convert the information and display a summary of the file on the webpage ④.
- Issues relating to the content of the file such as incorrect codes or fields not completed in full will be shown in red (you can scroll across and down the information to see all the highlighted errors/upload issues).

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.

The screenshot shows the ACE Bulk Upload interface. At the top, there's a navigation bar with tabs: Apprentices, Rejected (2), Awaiting Certification (33), Payment Pending (2), Certificate Approved (30), and a Logout button. Below this is a sub-navigation bar with options: View Apprentices, Add Apprentice, and Bulk Upload (highlighted with a red circle ①). The main content area is titled 'Bulk upload'. It features a 'CSV File' section with a 'Choose a file' input, a 'Browse...' button (circled ②), and an 'Upload' button (circled ③). To the right is a 'Templates' section with a 'Download a template' button and links to 'Comma Separated Values (CSV) empty template' and 'Excel(XLS) empty template'. Below these is a table with 11 columns: Gender*, Forename*, Surname*, DOB*, Ethnic Group*, NI Number*, UniqueNr, Appr.Street*, Appr.Postcode*, Appr.Town*, and Appr.Cour*. The table contains three rows of data, all of which are highlighted in red, indicating errors. A red banner at the bottom of the table states: '28 errors found. Please update CSV file and upload again.'


Gender*	Forename*	Surname*	DOB*	Ethnic Group*	NI Number*	UniqueNr	Appr.Street*	Appr.Postcode*	Appr.Town*	Appr.Cour
M	Lee	Lee	12/12/1990	W	AB123456C	CG654321	Great Street	GR8 8GR		
M	Lee	Lee	12/12/1990	W	AB123456C	CG654321	Great Street	GR8 8GR		
M	Lee	Lee	12/12/1990	W	AB123456C	CG654321	Great Street	GR8 8GR		

28 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 ACE system.
- 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 ACE.

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.



Apprentices Rejected (2) Awaiting Certification (33) Payment Pending (2) Certificate Approved (30) Logout

View Apprentices Add Apprentice Bulk Upload

Bulk upload

CSV File

Choose a file
Browse...
Upload

Templates

Download a template
[Comma Separated Values \(CSV\) empty template](#)
[Excel\(XLS\) empty template](#)

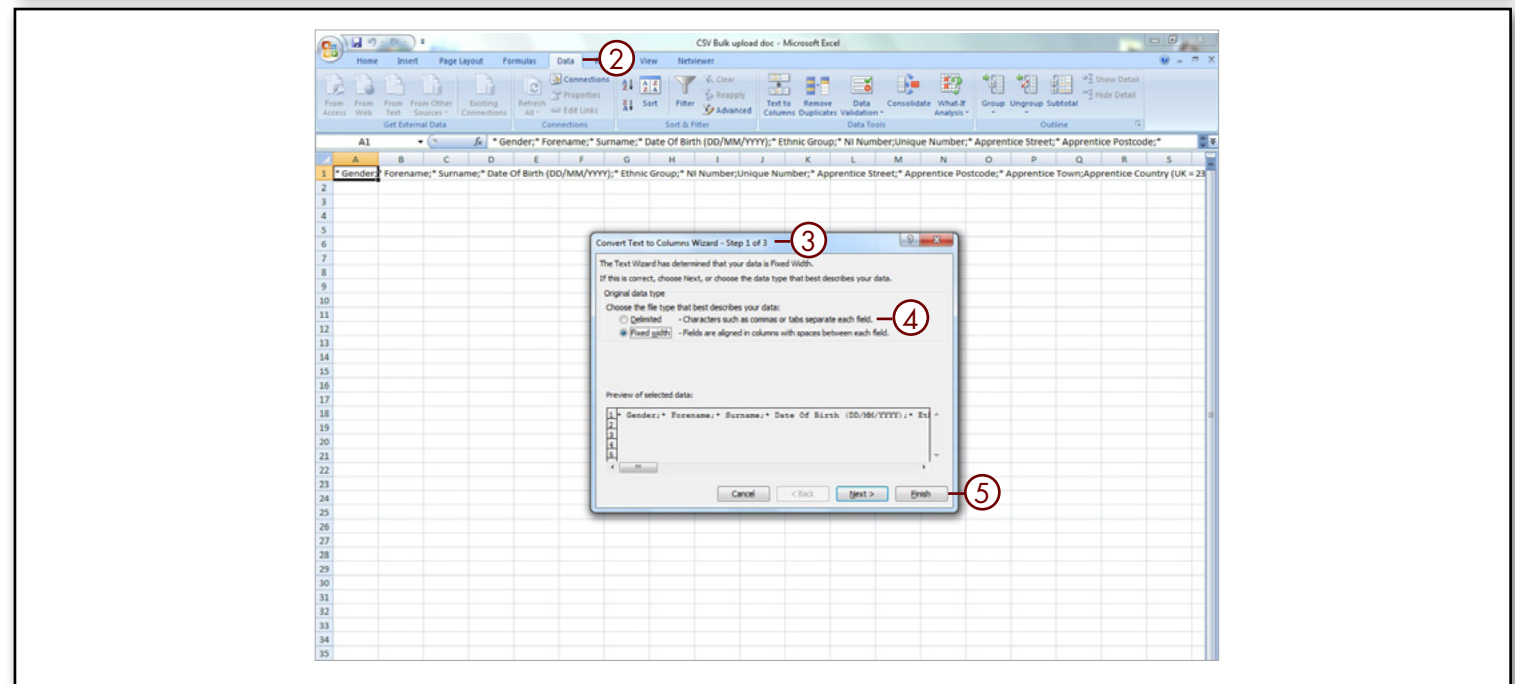
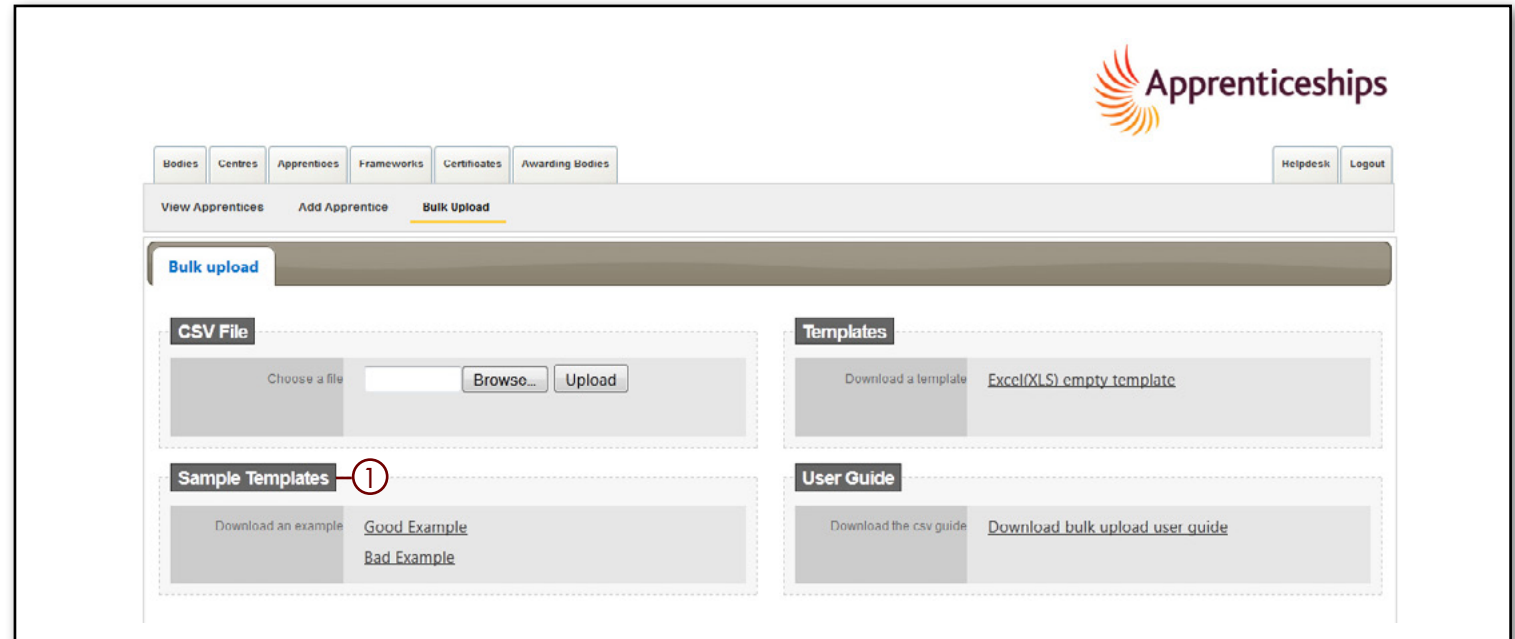
Gender*	Forename*	Surname*	DOB*	Ethnic Group*	NI Number*	UniqueNr	Appr.Street*	Appr.Postcode*	Appr.Town*	Appr.County*
1	Lee	Lee	12/12/1990	31	AB123456C	CG654321	Great Street	GR8 8GR	Glasgow	232
1	Lee	Lee	12/12/1990	32	AB123456C	CG654321	Great Street	GR8 8GR	London	232
1	Lee	Lee	12/12/1990	33	AB123456C	CG654321	Great Street	GR8 8GR	London	232

No errors found.

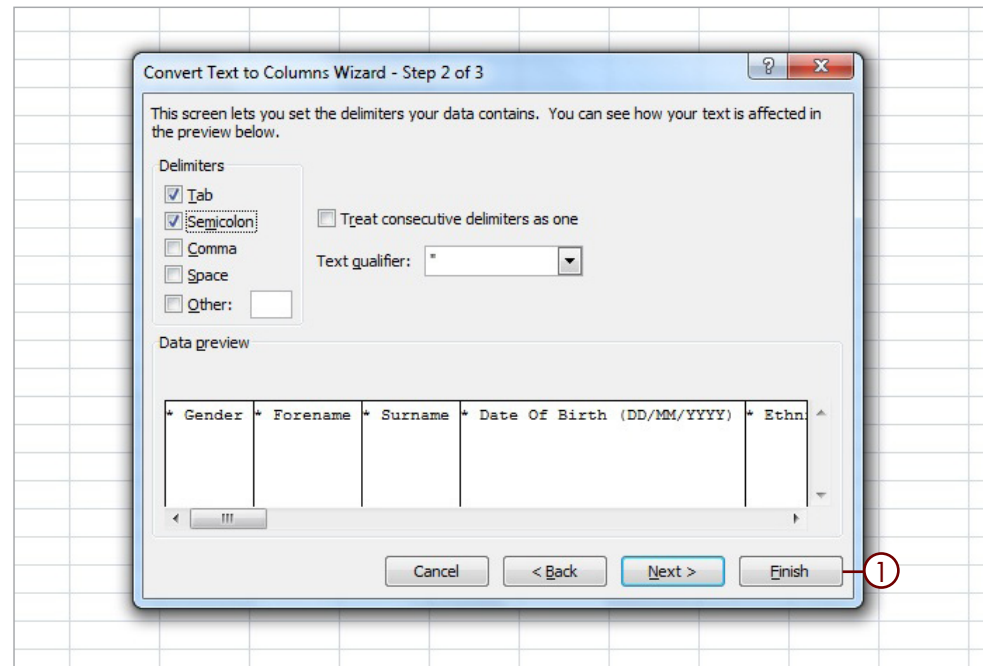
3 items saved.

Please note that if you wish to use this method for Bulk Upload you will need to contact the ACE 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 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 ACE 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 the wizard will automatically set the headings into columns which you will be able to see in the preview box, select **Finish** ① 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: ②
- When all the data is entered, give the file a relevant filename and **Save** to a suitable drive/directory/folder location.



② APPRENTICE DETAILS	APPRENTICE INFORMATION	EMPLOYER INFORMATION	ADDITIONAL INFORMATION
Gender*	Apprentice Street*	Employer Name*	Purchase Order Number
Date of Birth* (DD/MM/YYYY)	Apprentice Postcode*	Contact *	Awarding Body Number
Ethnic Origin*	Apprentice Town*	Employer Size*	
NI Number*	Apprentice Country*	Contact Position	
	Apprentice Email	Employer Street*	
	Apprentice phone	Employer Town*	
	Apprentice Start Date* (DD/MM/YYYY)	Employer Email	
	Apprentice Completion Date* (DD/MM/YYYY)	Employer Phone*	

- Now the file is in the CSV file format is correctly setup, return to the **Bulk Upload** ① page of the ACE 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 ACE and then click the **Upload** button ③.
- The ACE system will upload and convert the information and display a summary of the file on the webpage ④.
- Issues relating to the content of the file such as incorrect codes or fields not completed in full will be shown in red (you can scroll across and down the information to see all the highlighted errors/upload issues).
- 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 ACE 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 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 ACE.
- 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 ACE, then please contact FISSS and we may be able to facilitate this by working with individual software suppliers.

Hello alison Bucknell !
You are logged in to Castle



Apprentices
Rejected (1)
Awaiting Certification (32)
Payment Pending (2)
Certificate Approved (20)
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)

Search

Outbox

Select All
DeSelect All
Show deleted
Print view
Export all

NI Number	Forename	Surname	DOB	Status	Framework	Days Elapsed	Reject
J8 88 88 99 S	joanne	smith	16-10-1992	Certificate printed	Tester		
JK 12 34 56 L	Steve	Simpson	20-01-1994	Entered	Tester		
JX 77 00 55 X	matty	campbell	15-10-1993	Certificate printed	Tester		
JK 12 34 56 L	Steve	Simpson	20-01-1994	Entered	Tester		
WM123456H	Jean	Footer	10 10 1998	Entered	Tester		
AB123456C	Jordan	Barry	01-05-1993	Entered			
AB123456C	Leith Leon Jaymes	Witley	31-03-1993	Entered			
AD123456C	Catherine	Gordon-Wright	10-03-1993	Entered			
AB123456C	Jordan Leigh	Horton	19-10-1994	Entered			
AB123456C	Aaron James	Bennett	20 12 1992	Entered			
AB123456C	Josh	Plaza	01-12-1993	Entered			
AB123456C	Jamie	Aziz	23-09-1993	Entered			
AB123456C	Vicky May	Merryfield	05-06-1993	Entered			
AB123456C	Luke	Jeffers	10-07-1993	Entered			
AD123456C	Zara	Patterson	17-09-1994	Entered			

Find
Surname

15
Page 1 of 14
Displaying: 1 to 15 of 205 items.

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

Telephone: 0844 573 2560 **E-mail:** ace@fisss.org

Apprenticeship Certificates
England