

Open University Validation Partnerships

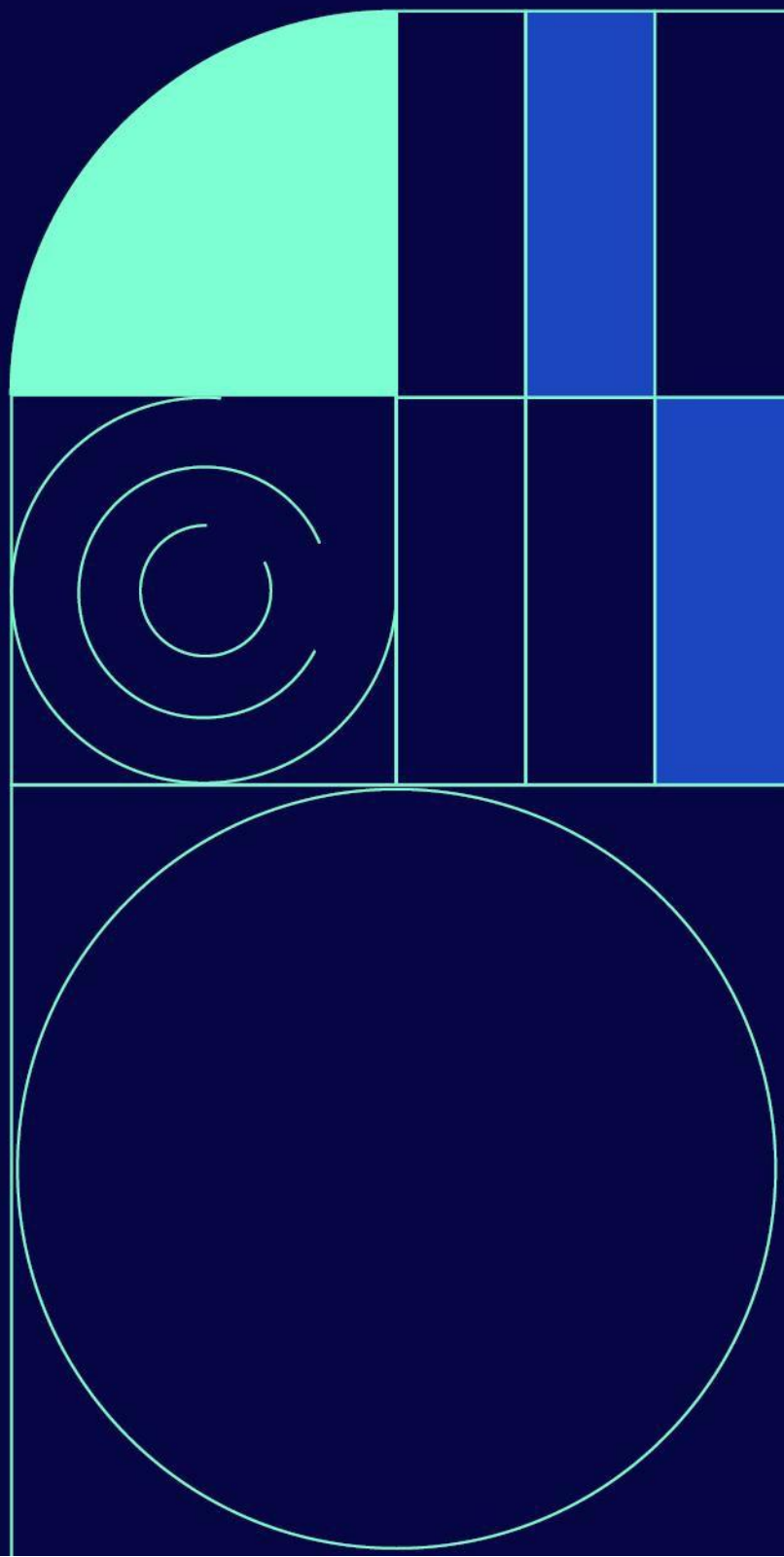
Validation Partnerships Portal User Guide

Student registrations and maintenance

Created date: 28 June 2024

Version: 1.3

Latest version date: 10 July 2026



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Introduction

This document contains guidelines for The Open University's (OU) partner institutions in uploading student registrations on OU validation programmes using the Validation Partnerships Portal.

If you need any further clarification, please email ouvp-admin@open.ac.uk.

Login and user responsibility

For reasons of data security, logins are only issued to the named registration contacts at each institution that are responsible for the accuracy of OUVp student data submitted via the portal.

When each user is set up, an email will be sent to them to invite them to create a password to log into their account.

Please keep this login information secure. It is only to be used by the person who has been set up to use it.

Note that the email sender will be ouvp-admin@open.ac.uk – and this email may go into spam folders. If no email is received, contact the team for support

As cyber attacks grow more common, passwords no longer provide sufficient safeguards against unauthorized account access. Multi-factor authentication (or MFA) adds an extra layer of protection against cyber threats. Our portal provider, Salesforce, has an authenticator app that allows you to complete this process.

The app is free to download for Apple and Android:

[Download from Google Play](#)

[Download from Apple Store](#)

An instruction video on how to use the Authenticator app is here:

[How to Use Salesforce Authenticator for MFA Logins](#)

The Statement of Responsibility for Portal Users can be found in Appendix 2.

1.1 Forgotten password

If you have forgotten your password, follow the steps on the login page to reset your password.

If you need any assistance with this or MFA, please contact ouvp-admin@open.ac.uk.

1.2 Timeout

If you leave yourself logged into the Portal for more than two hours with no activity you will be logged out.

1.3 Statement of responsibility for Validation Partnerships Portal

- Each registration contact is responsible and accountable for all activities carried out under their user account. Authentication details should not be divulged to anyone or stored insecurely or on a personal computer.
- Passwords must be unique and not re-used between different systems or accounts.

- After authenticating themselves, users must not leave their computers unattended whilst unlocked.
- No person should jeopardise the integrity, performance or reliability of the computer software
- Attempts to access or use any other username which is not authorised to the user are prohibited
- Any unusual or suspicious activity must be reported to the OU.
- Each registration contact is responsible for the accuracy of the data they supply.
- Each registration contact undertakes not to infringe any copyright in documentation and/or software.
- Each registration contact undertakes to comply with the provisions of the Computer Misuses Act (1990), Criminal Justice and Public Order Act 1994, General Data Protection Regulations, the Data Protection Act 2018 and any other relevant statutes.

For new registration contacts a new user account will need to be requested – to do this, contact ouvp-admin@open.ac.uk.

Please note that any changes or new requests for username/passwords will take up to two working days to process.

Navigation in Validation Partnerships Portal

2.1 Homepage

The homepage is the first page that is visible when logging into the portal. This page provides the links to download the student registrations template and upload new students.

There is also a link to a *Contact your Aftercare Team* button – this will open a new email in your default email account.

A report of current students and their status is visible as a chart – clicking on this chart will open a new view of the chart and a link to open the report

A list of current programmes is also visible on the homepage.

2.2 Students and student registrations

Clicking on the *Students* tab in the navigation bar opens a page with two sub-tabs: *Students* and *Student Registrations*. The *Students* tab is a list view of all students within the Portal. Each student record can be opened by clicking on the blue hyperlink under *Name*. The student record contains personal information on the student.

The *Student Registrations* tab is a list view of all student registrations within the portal. Again, the record detail can be viewed by clicking the blue hyperlink, this

time under *Student Registration Name*. Note that this is an automated reference number for the record.

See the *Student maintenance* section of this document for more detail on how to edit the student and student registration data.

2.3 Programmes

The *Programmes* tab provides several list views:

- a. All Programmes
- b. Approved
- c. Conferments Only
- d. Pending Approval
- e. Recently Viewed

Each of these list views is filtered by the programme status and can provide information on available programmes with the OU.

Clicking on the blue hyperlink opens a record – the information within that record cannot be edited.

2.4 Awards

The *Awards* tab provides two list views:

- a. Active Awards
- b. Recently Viewed

These list views provide a list of the available Awards. Clicking on the blue hyperlink opens a record – the information within that record cannot be edited.

Award sessions show at the bottom of the award record page – these are the registration sessions for each award. The status and the registration period are shown within the award session record.

2.5 Reports

The *Reports* tab provides three reports that can be run within and exported from the Portal.

Selecting *All Reports* on the left-hand side will provide a list of the three reports

- a. Continuing students – report for partner portal to see continuing students
- b. New students – report for partner portal to see new students
- c. Students grouped by status – OUVF partner portal report to see students grouped by status and academic year

Clicking on the *Report* hyperlink will open the report itself with a chart at the top of the page and the data table at the bottom.

The *Export* button on the right-hand side allows the data to be exported as a formatted report (Excel file), or as a raw data report (Excel or .csv options are available).

Clicking *Enable Field Editing* allows some data to be edited directly within the report, rather than opening individual records. Fields that can be edited show a pencil icon when hovering over the field, if they cannot be edited, a padlock icon will be displayed.

2.6 My Partner Account

This tab shows your account information. This includes the address, phone, website and other contact information.

Fields that can be edited will show a pencil icon next to them. To amend the information, please contact your aftercare team.

2.7 Search

At the top right-hand side of the page, there is a search bar. This search function will provide results for students, student registrations, awards and programmes that are searched for using key words.

When an item is searched for, a new page will open with the search results. These can be filtered using the options on the right-hand side of the page (note that students are stored as contacts in the database).

Download student registration template

To enter new registrations, a .csv file of new student details will need to be created. An Excel version of the template can be downloaded from the homepage of the portal. Note that once downloaded and completed, a new version will need to be saved as a .csv file.

The link to download the template is on the right-hand side of the homepage, labelled **Student Registrations Template**. Note that a separate spreadsheet is required for each registrable award.

Appendix 1 contains a checklist that can be consulted prior to attempting to load the .csv file into the portal.

Once the template is completed, please move on to the guidance below.

Upload new student details

From the Homepage, click the **Upload New Students** button to open a dialogue box.

- a. Search for the relevant programme that students are to be registered on. Note that only those with open award sessions will be available to select from this list.
- b. Select the award session from the next search box. There should be only one award session available.
- c. Attach the .csv file on the right-hand side by either dragging and dropping the relevant file, or by searching for it with *Upload files*. Note that only .csv files can be attached
- d. Once these steps are completed, the **Submit** button will turn blue and be available for selecting. Click **Submit** and the upload process will begin.

If the upload is successful, a message will appear at the top of the screen:

"Success – Student data inserted successfully". If it is not successful, an error message will appear in red in the dialogue box.

Appendix 1 contains further information on possible errors and how to rectify them.

To view the details of the uploaded students, select the *Reports* tab from the navigation bar, select *All Reports*, then the report titled *New Students*, which will bring up a report of all new students added, which can be used to verify the data upload.

Student maintenance

5.1 Withdraw or defer student (available all year)

Search for the name of the student using the Search box, or within the “*All students*” view on the *Students* tab.

Within the student record, select *Student Registration* at the bottom of the page. (Click the blue link on the name to open the record).

Change the *Registration Status* field to *Withdraw* or *Defer* as required (click the pencil icon to edit).

Click **Save** to update the record.

5.2 Reinstate deferred student (available all year)

Search for the name of the student using the Search box, or within the “*All students*” view on the *Students* tab.

Within the student record, select *Student Registration* at the bottom of the page. (Click the blue link on the name to open the record).

Change the *Registration Status* field to *Current* as required (click the pencil icon to edit).

Click **Save** to update the record.

5.3 Transfer student (during registration window)

If a student transfers from one validated award to another, without conferring on their previously registered award, their registration status will need to be updated to *Transfer* on their most recent student registration, and then a new registration can be uploaded in the student registration process detailed above.

5.4 Register a student on second or new award (during registration window)

This applies to:

- a. any student who was previously registered on one OU validated award, has conferred on that award and who is now continuing their studies on a higher award within the same award hierarchy.
- b. any student who has previously conferred on one OU validated award and who has now chosen to study for another, unrelated award.

These students should be registered on their new awards as part of the upload student registration process.

5.5 Edit student details (available all year)

Clicking on the *Students* tab in the navigation bar opens a page with two sub-tabs: *Students* and *Student Registrations*. The *Students* tab is a list view of all students within the Portal. Each student record can be opened by clicking on the blue hyperlink under *Name*.

The following details can be updated in the record:

- a. Name
- b. Email
- c. Phone
- d. Mobile
- e. Address

If any other details need to be updated, please contact ouvp-admin@open.ac.uk.

APPENDIX 1: New registration template guidance

This appendix provides detail on how to complete the .csv template for student registrations, as introduced in Section 3. For each validated award that has new students, you should prepare (or download and prepare) a .csv file, one per validated award, of new student details, according to the specification below.

File upload specification

- Each separate file should follow this specification exactly, in order that you can submit your data into the Portal. If the files are not prepared according to this specification, your data will not be uploaded.
- After you have downloaded the new registrations template, please ensure you do not delete the header row.
- Each file must have the following columns A–Q in the file, in the specified order, left to right.
- The template is downloaded as an Excel file. Once the file is completed, it needs to be saved as a .csv to enable the upload into the Partnerships Portal.
- Some of the columns have a dropdown list of values – values that are not in these lists cannot be used, otherwise the data cannot be uploaded into the portal

An example of some of the fields within the sheet are detailed below.

Institutional Student Reference	Salutation	First Name	Surname	Date of Birth	Gender	Mode of Study	Academic Level of Study	Street	City	Country	Zip/Postal	Phone Number	Mobile Number	Email address	Location	Staff Member	Highest Qualification	On Entry	Ethnicity
99775511	Quentin	Ford	25/07/2001	Male	Part time	4	1	Random	Anywhere	MKS	6RT	0	0	mynameisquentin@email.com	No	D			White - English, Scottish

Column Headings and definitions:

Column Header	Definition
Institutional Student Reference	This is the partner institution's student reference (personal identifier).
Salutation	Available options: Mr., Ms., Mrs., Prof., Dr., Mx.
First Name	Given/First name of student
Surname	Surname/Last name/Family name of student
Date of Birth	Must be in DD/MM/YYYY format
Gender	Available options: Male, Female, Nonbinary, Not listed
Mode of Study	Full time, Part time
Academic Level of Study	This is the level of study the student is starting study. Available options: 3, 4, 5, 6, M(Masters level), D(Professional Doctorate)

Street	First line of address (including house number/name)
City	City
Country	Country of residence – this is a dropdown list of countries – please search for the relevant one.
Zip/Postal Code	Post code (UK) or other zip code for overseas
Phone Number	Home phone number (not mandatory)
Mobile Number	Mobile/cell number
Email address	Email address
Location	Only required if there are multiple locations of study – otherwise this can be left blank.
Staff Member	If the student is also a member of staff at this institution, select "Yes".
Highest Qualification on Entry	Please provide highest qualification on entry into study. Options are on last page of Appendix
Ethnicity	Please state ethnicity of student. Options are on last page of appendix
Disability	Please state any declared disability. If the student has declared more than one, add the primary condition to the upload file.
Applied for RPEL/RPCL	If the student applied for RPEL (Recognition of Prior Experiential Learning) or RPCL (Recognition of Prior Certificated Learning) for this study, please select "Yes"
Course Start Date	Please provide the course start date for this study

Common errors in upload

1. Unable to click the *Submit* button

- The Submit button will only be available to be clicked (turns blue) when the correct Programme and Award Session have been selected and a file has been selected. This MUST be a .csv file for the Submit button to be available.

2. No award session available to select

- This means that the selected Programme/Award does not have an open registration period at this time. Award Sessions can be viewed on the Award record page to see when they are open or closed.
- If there is no Award Session where one is expected, please contact the aftercare team: ouvp-admin@open.ac.uk.

3. Error Message on Upload – *“Unable to read the data from csv file, please check the data and format and upload again”.*

- The file that has been selected for upload has no data in it – please check the template.

4. Students uploaded/registered to the incorrect award in error. (**Partner to action**):

If you have incorrectly registered a number of students to the incorrect award there is the functionality to do a bulk update for these students.

It should not be used to transfer students to a new programme as this will overwrite the initial registration – this function must **only** be used when you have assigned students to the incorrect award at the point of registration.

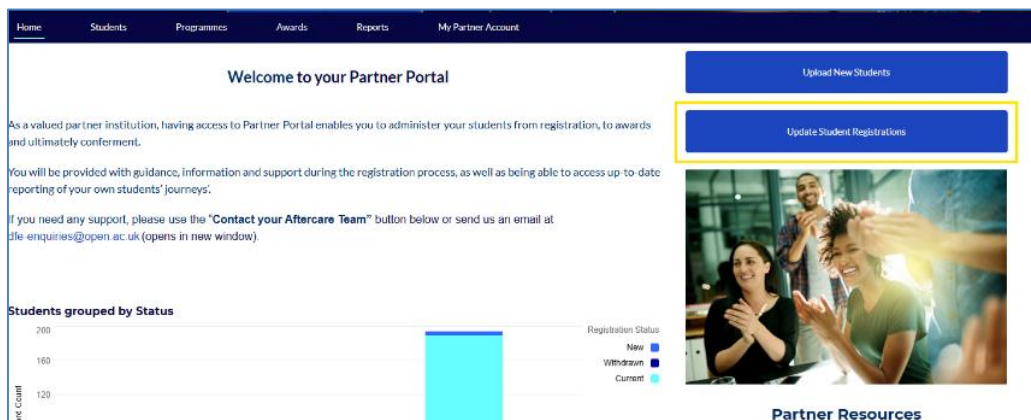
- Obtain the students details you wish to update
- Download the template from the Partner Portal Home Page:



- Completed the information required within the template. You will need to complete all information, otherwise the field will update to a blank value. **Ensure you save this as a .csv file.**

OUPPID	Student Registration Name	Registration Status	Mode	Academic Level	Academic Year	Location

- Click on the button 'Update Student Registrations'



- Complete the upload screen:
 - Select the Programme you wish to update the registrations to (the **new** programme to be transferred to)
 - Select the Award Session (this **new** Award to be transferred to)
 - Upload your **.csv** file
 - Click Submit

The 'Update Students Registrations' form is shown. It has two search fields: 'Search Program' with 'Test Programme' selected, and 'Search Award Session' with 'BSc Other Test Degree' selected. To the right, there's an 'Upload student file' section with a 'Student file' label, an 'Upload Files' button, and 'Or drop files' text. Below this, the filename 'Test Partner Student reg update 240226.csv' is displayed. At the bottom, there is a 'Submit' button and a 'Close' button.

- Student records will now be updated to the new Award Session and

The 'Student Registration' details page for A-366387 is shown. It includes fields for 'Award Programme' (Test Programme), 'Registration Status' (New), and 'OUVPID' (522981). Below this, there's a 'Student Registration Information' section with fields for 'Student Registration Name', 'Contact', 'Registration Status', 'Academic Level', and 'Academic Year'. To the right, there's a 'Mode' field (Full time) and a 'Programme Location' field. The 'Award' field is highlighted with a yellow box and shows 'BSc Other Test Degree'.

Award:

Descriptions and definitions for file upload

Ethnicity Values	
Asian – Bangladeshi or Bangladeshi British	
Asian – Chinese or Chinese British	
Asian – Indian or Indian British	
Asian – Pakistani or Pakistani British	
Any other Asian background	
Black – African or African British	
Black – Caribbean or Caribbean British	
Any other Black background	
Mixed or multiple ethnic groups – White or White British and Asian or Asian British	
Mixed or multiple ethnic groups – White or White British and Black African or Black African British	
Mixed or multiple ethnic groups – White or White British and Black Caribbean or Black Caribbean British	
Any other Mixed or Multiple ethnic background	
White – English, Scottish, Welsh, Northern Irish or British	
White – Irish	
White – Roma	
Any other White background	

Arab
Any other ethnic background
Not known
Prefer not to say
Not available
Disability Values
Learning difference such as dyslexia, dyspraxia or AD(H)D
Social/communication conditions such as a speech and language impairment or an autistic spectrum condition
Long-term illness or health condition such as cancer, HIV, diabetes, chronic heart disease, or epilepsy
Mental health condition, challenge or disorder, such as depression, schizophrenia or anxiety
Physical impairment (a condition that substantially limits one or more basic physical activities such as walking, climbing stairs, lifting or carrying)
D/deaf or have a hearing impairment
Blind or have a visual impairment uncorrected by glasses
Development condition that you have had since childhood which affects motor, cognitive, social and emotional skills, and speech and language
No known impairment, health condition or learning difference
An impairment, health condition or learning difference not listed above
Prefer not to say
Not available

If a student has declared more than one disability, the primary health problem should be added to the upload template.

Salesforce allows more than one option to be recorded for disability, which can be added in the Portal after the record has been uploaded.

Highest Qualification on Entry

The students' highest qualification should be provided in the HESA level format. Descriptions of these levels are provided below.

HESA level	Description
D	A/AS level or equivalent (e.g., Advanced Placement, International Baccalaureate)
E	Access to Higher Education Diploma
L	Level 3 NVQ (National Vocational Qualification)
M	Level 3 BTEC National Diploma or Certificate
H	Higher education qualification (e.g., degree, diploma, certificate, or equivalent)
I	Entry-level qualifications (e.g., Entry Level Certificate, Skills for Life)
J	Level 2 qualifications (e.g., GCSEs, O levels, Key Skills Level 2)
C	Level 6 qualifications (e.g., Bachelor's degree, Graduate Certificate, Graduate Diploma)
P	Level 3 Welsh Baccalaureate Advanced Diploma

Statement of responsibility for portal users

- Each registration contact is responsible and accountable for all activities carried out under their user account.
- Authentication details should not be divulged to anyone or stored on insecurely or on a personal computer.
- Passwords must be unique and not re-used between different systems or accounts.
- After authenticating themselves, users must not leave their computers unattended whilst unlocked.
- Attempts to access or use any other username which is not authorised to the user are prohibited.
- No person should jeopardise the integrity, performance or reliability of the computer software.
- Any unusual or suspicious activity must be reported to the OU.
- Each registration contact is responsible for the accuracy of the data they supply.
- Each registration contact undertakes not to infringe any copyright in documentation and/or software.
- Each registration contact undertakes to comply with the provisions of the Computer Misuses Act (1990), Criminal Justice and Public Order Act 1994, General Data Protection Regulations, the Data Protection Act 2018 and any other relevant statutes.

- If a user does not log into the portal for a period of **three months**, their account will be automatically marked as inactive. To reactivate access, please contact the OUVF Admin Team at ouvp-admin@open.ac.uk.
- If a nominated user leaves your institution or no longer requires access, please

