

Open University Validation Partnerships

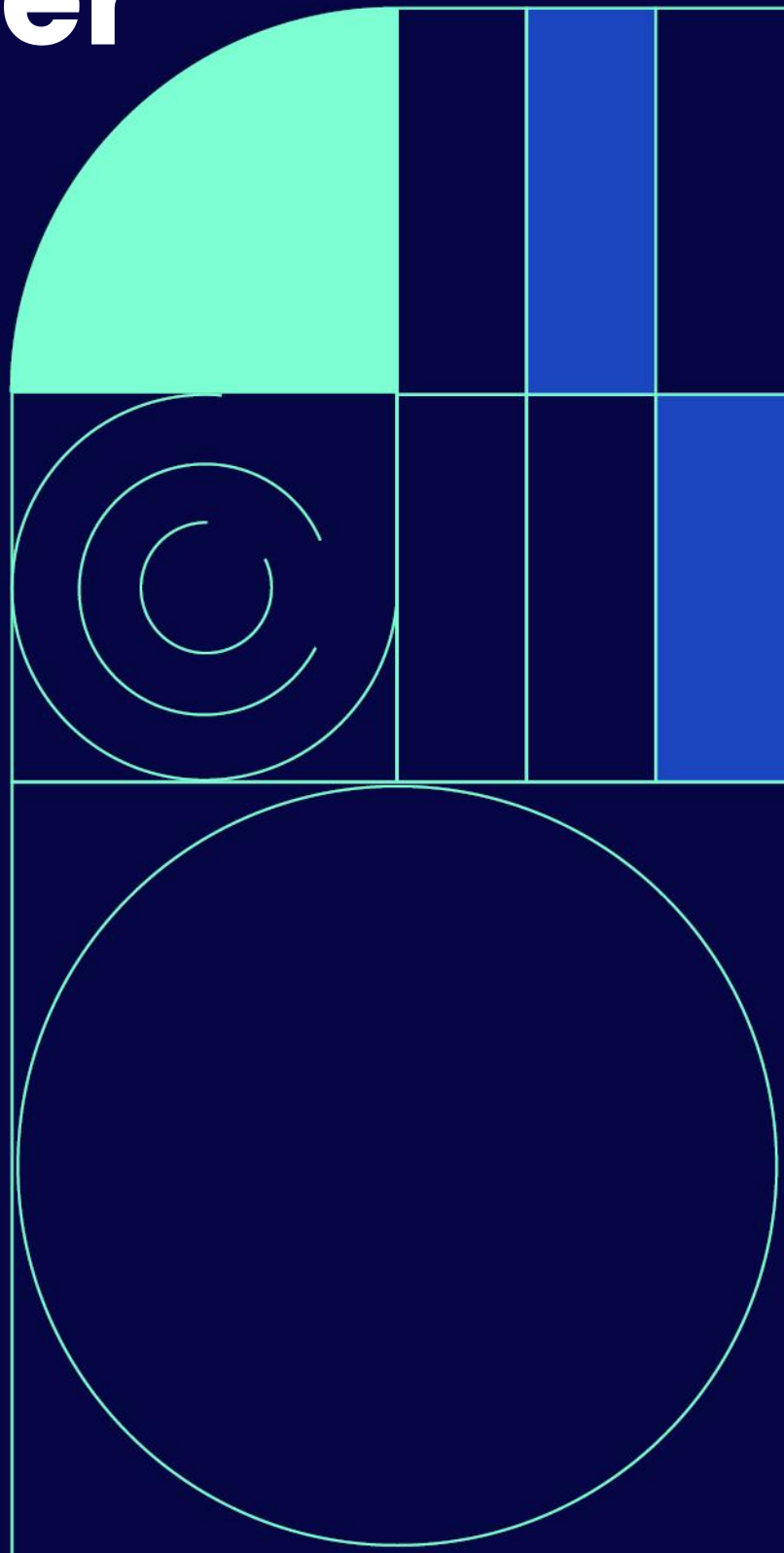
# Validation Partnerships Portal User Guide

Student registrations  
and maintenance

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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](mailto: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](mailto:ouvp-admin@open.ac.uk) – and this email may go into spam folders. If no email is received, contact the team for support

As cyberattacks grow more common, passwords no longer provide sufficient safeguards against unauthorised 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](mailto: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](mailto: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**. Please note that a separate spreadsheet will be required for each registerable award at a specific location.

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 to. 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. **Optional:** If students are studying at different locations, please select the relevant location from the next search box. If the location is not available, please contact the support team for guidance.
- d. 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
- e. 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, they will need to be marked as *Withdrawn* on their first student registration, and then a new registration can be uploaded in the student registration process.

## 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](mailto: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 load.
- 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

The fields within the sheet are detailed below.

	A	B	C	D	E	F	G	H
1	Institutional Student Reference	Salutation	First Name	Surname	Date of Birth	Gender	Mode of Study	Academic Level of Study
2	12345	Mr.	John	Smith	01/08/1994	Male	Full time	5
3								
4								
5								

**Institutional Student Reference:** This is the partner institution's student reference (personal identifier).



**Salutation:**

Mr.	Mrs.	Ms.	Dr.	Prof.
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**First Name:** Given/First name of student**Surname:** Surname/Last name/Family name of student**Date of Birth:** Date of birth – must be in DD/MM/YYYY format**Gender:**

Male	Female	Nonbinary	Not listed
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**Mode of Study:**

Full time	Part time
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**Academic Level of Study:**

4	5	6	M (masters level)	D (Professional Doctorate)
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I	J	K	L	M	N	O
Street	City	Country	Zip/Postal Code	Phone Number	Mobile Number	Email address
1 Streetname	Citysville	United Kingdom	LL1 1LL	123456789	798542517	email@smple.com

**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**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.

## 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](mailto: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.

## **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](mailto:ouvp-admin@open.ac.uk).
- If a nominated user leaves your institution or no longer requires access, please

