



# Student Registrations and Maintenance

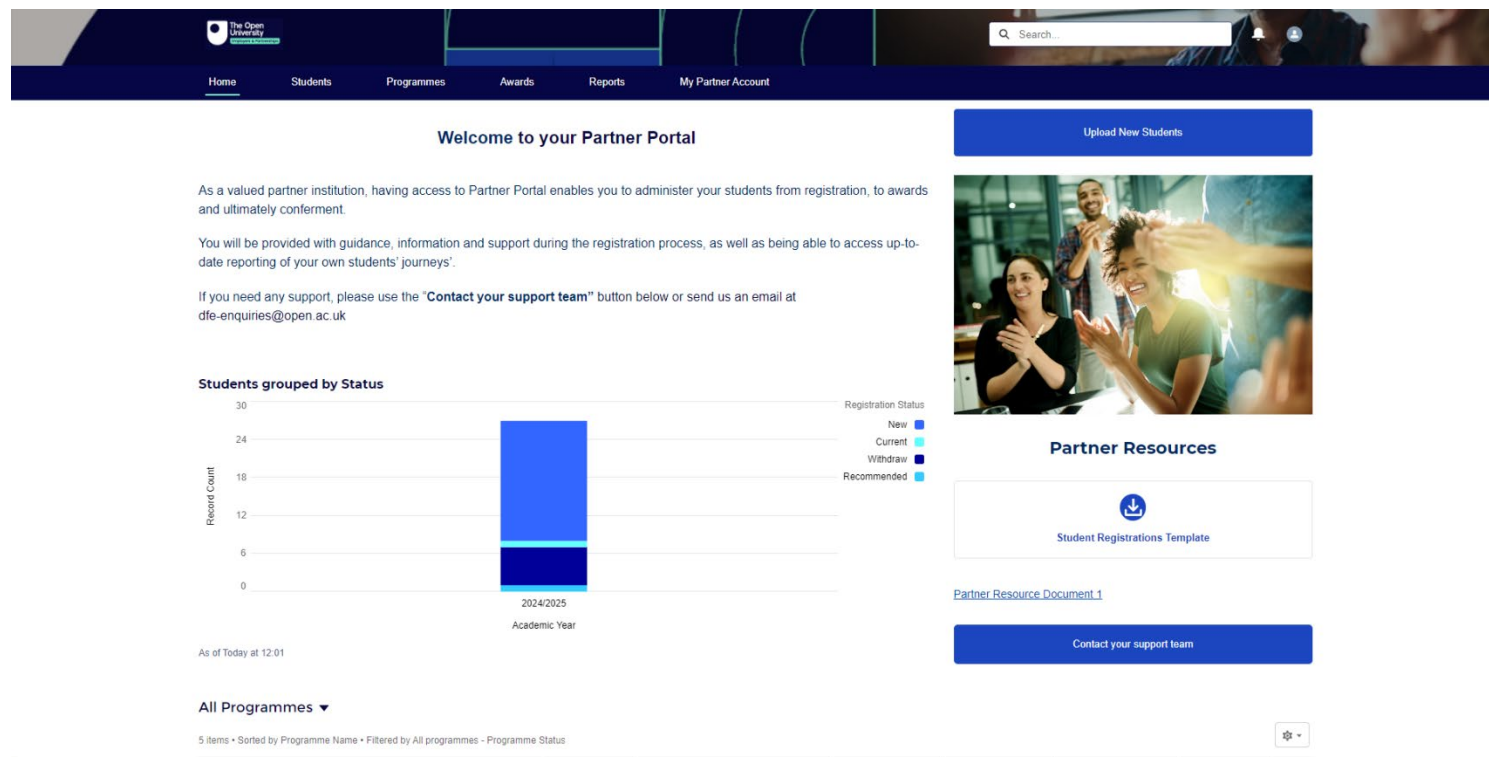
Salesforce Partner Portal – Quick Start Guide

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## Process Overview

This document contains guidelines to assist OU's partner institutions when uploading OU student registration details into the Validation Partnerships Portal.



## Account set-up

You will receive an email from [ouvp-director@open.ac.uk](mailto:ouvp-director@open.ac.uk) which will attach a demonstrational video alongside this guidance document. This email will also mention that you will receive an email in August 2025 regarding login details. If you cannot locate the login email, please check your junk folder. If you still cannot locate the email, please contact [ouvp-director@open.ac.uk](mailto:ouvp-director@open.ac.uk).

## Student Registration Template

A student registration template is available for you to use to upload new student details. The template can be downloaded from the Home Page of the Partner Portal. The template will need to be saved as a csv file (**Please note that in the csv file please avoid using commas as they may interfere with the system's data computation**).

The link to download the template is on the right-hand side of the Home Page, labelled **Student Registrations Template**. Please note that a separate spreadsheet will be required for each registerable award at a specific location.

Please see example of the template with some of the fields below:

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)

City

Country

Zip/Postal Code

Phone Number

Mobile Number

Email address

Location (does not need to be completed if not required)

### Upload new student details

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

- a. Search for the relevant Programme that students are to be registered.
- 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.

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.

## Programmes

The Programmes tab provides several list please picklist option A or B.

- a. All Programmes
- b. Approved

Each of these list views is filtered by the Programme status and can provide information on available Programmes with the Open University.

## **Reporting**

There are 3 reports which you can access from the 'All Reports' section

- a. Continuing Students
- b. New Students
- b. Students grouped by Status

All reports can be exported as a CSV file.

## **Student Maintenance**

Each Student record can be opened and edited.

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).

**VERSION CONTROL**

Date	Updated by	Comments	Version
01/07/25	Humaira Akter	Created Version	V1

