

CSV Add-In Tool User Guide 2006



CONTENTS...

Chapter 1 – Install the NCFE CSV Add-In

- Step 1 – Permanent Installation Page 1
- Step 2 – Load Add-In without Permanent Installation Page 2
- Step 3 – Change Security Settings Page 3

Chapter 2 – Understanding the *.CSV Tool

- Step 1 – Activate the Form Page 4
- Step 2 – Understanding the Form Controls Page 5-7

Chapter 3 – Create a CSV file using (Key in Method)

- Step 1 – Mandatory Information Page 8
- Step 2 – Date of Birth Page 9
- Step 3 – Check your input Page 9
- Step 4 – Save the File Page 10

Chapter 4 – Create a CSV file using (Imported data or Data Dump)

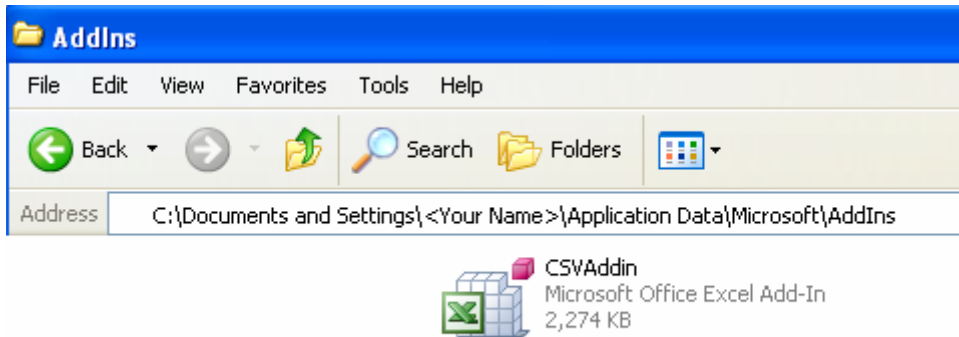
- Step 1 – What information do you need in your *.CSV File? Page 11
- Step 2 – Set up your NCFE Header row Page 12
- Step 3 – Prepare the first row Page 12
- Step 4 – Select and Insert Header Titles Page 13
- Step 5 – What happens if I make a mistake? Page 14

Chapter 5 – What do I do with the saved file?

- Step 1 – 17 uploading your data to the NCFE Portal Page 14-17

Chapter 1 - Install the NCFE CSV Add-In

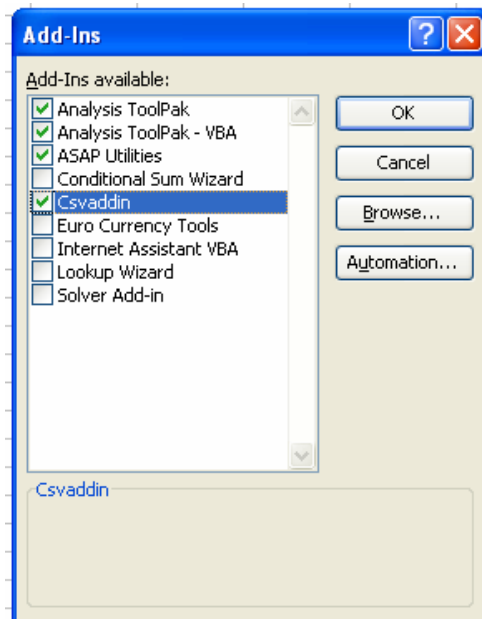
Go to <http://website.ncfe.org.uk/index.php/root/downloads> and download the CSVAddin. You can choose the Windows default folder to save your Add-in by navigating to: **C:\Documents and Settings\<Your Name>\Application Data\Microsoft\AddIns** or simply save it to your **C:\ Drive or Desktop**. The downloaded file will look like this:



Once the Add-in has been downloaded and saved you will need to decide whether to permanently install the Add-in or run it without installation. Both options are covered in the following guide. **Please note that this Add-in is only compatible with Excel 2000 or later.**

Step 1 - Permanent Installation

Open Excel. Go to **Tools > Add-Ins** to open the Add-Ins dialog. If you have stored your Add-In in the default location you will see its name displayed in the Add-Ins available: window (if you have stored your Add-In in a different location, use the **[Browse]** button to find it). Click on your **Add-In name** to see its description at the bottom of the dialog box.



As soon as the Add-In is installed its functions will be available in Excel. Find them in the User Defined section of the Function Wizard (Paste Function Tool) or simply type them into a cell as you would any built-in function. The Add-In will remain installed until you return to the Add-Ins dialog and uninstall it by removing the tick from the check-box.

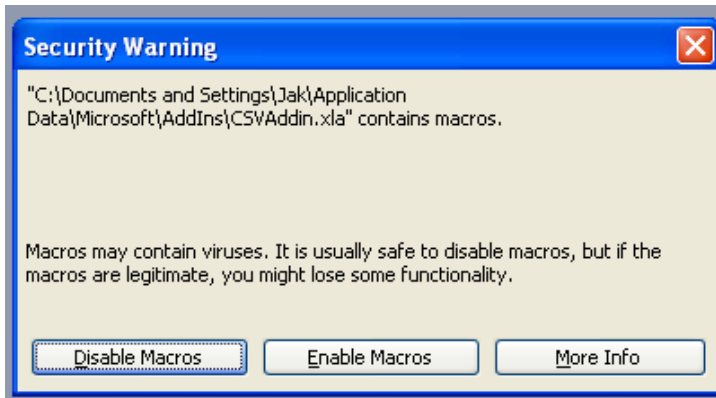
Once you click OK the dialog box will close and you will see a new item added to your existing toolbar entitled: **NCFE CSV Tool**.

Step 2 - Load Add-In without Permanent Installation

If you have chosen not to install the Add-in permanently and wish to run the program, then simply **Right click** on the Add-in and select **Open**.



Excel will open and you will be presented with a Security Warning. There is no malicious code in the NCFE Add-in so click **Enable Macros**. If in doubt, consult a member of your ICT department before proceeding.



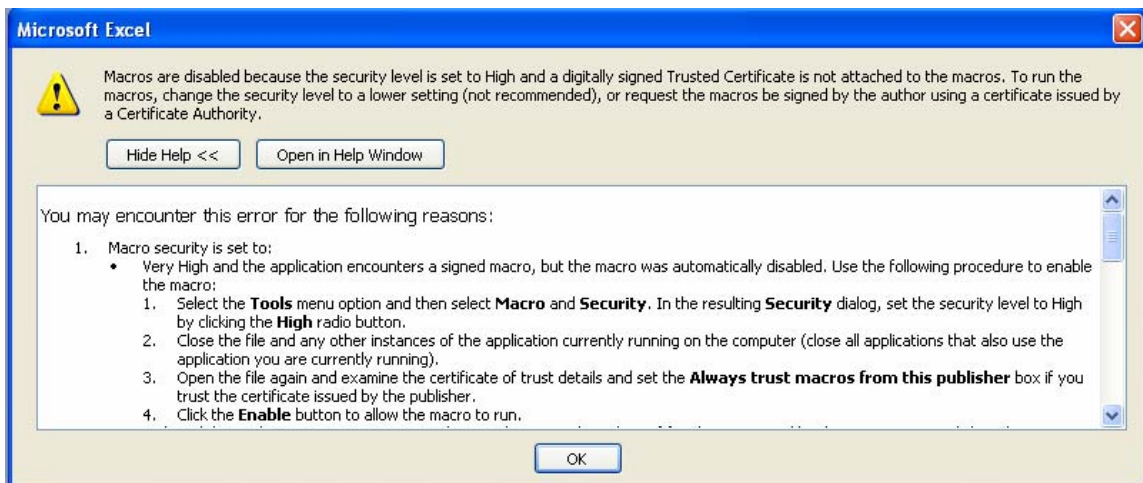
Click **ok** and select the new workbook icon in the top left corner of your screen.



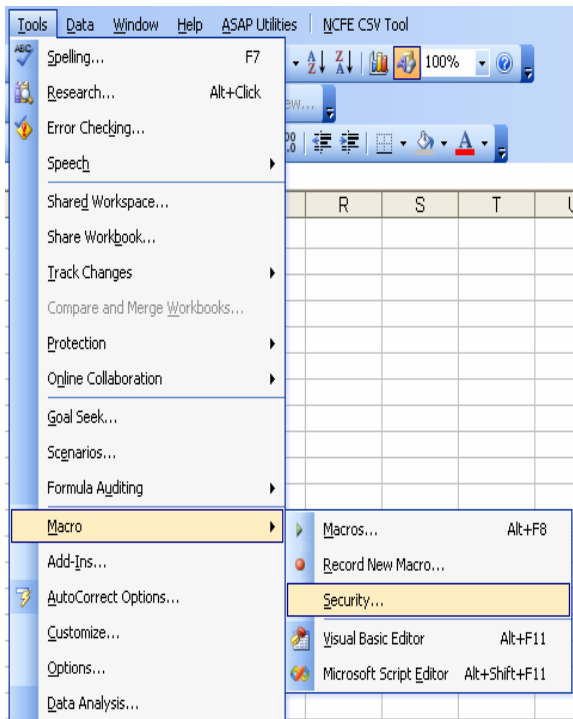
This will insert a workbook. Your **NCFE CSV Tool** bar will have been loaded and is ready for use.

However the NCFE Add-in will not be installed if you have your security settings to high. You will need to change your security settings before attempting to run the Add-in again.

If you get the following alert, go to **Change Security Settings**.



Step 3 - Change Security Settings

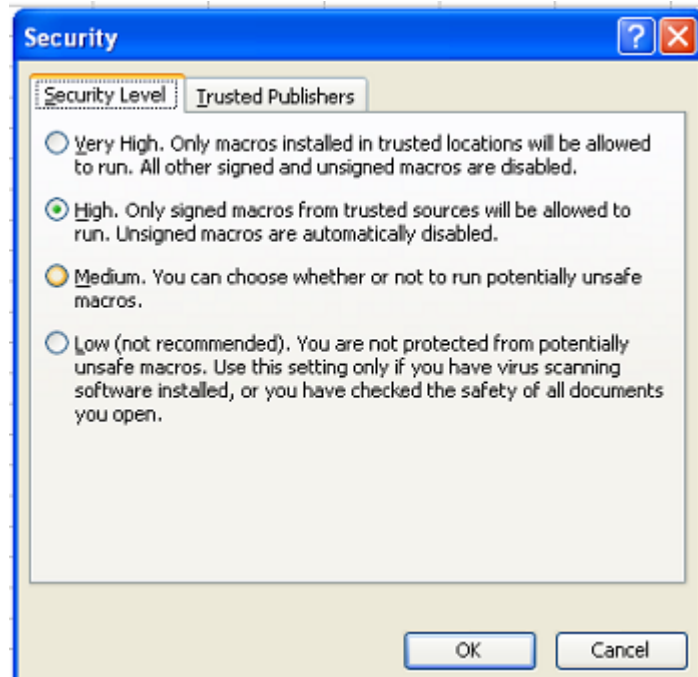


Step 1...

Click on **Tools > Macro > Security...**

Step 2...

If your settings are set to Very High or High, change them to medium and click the OK button. Your Security Settings have now been saved. Close Excel and re-run the Add-In again. When Enable Macros prompt is received, click **Enable Macros**.

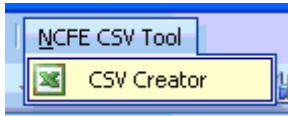


Chapter 2 – Understanding the *.CSV Tool

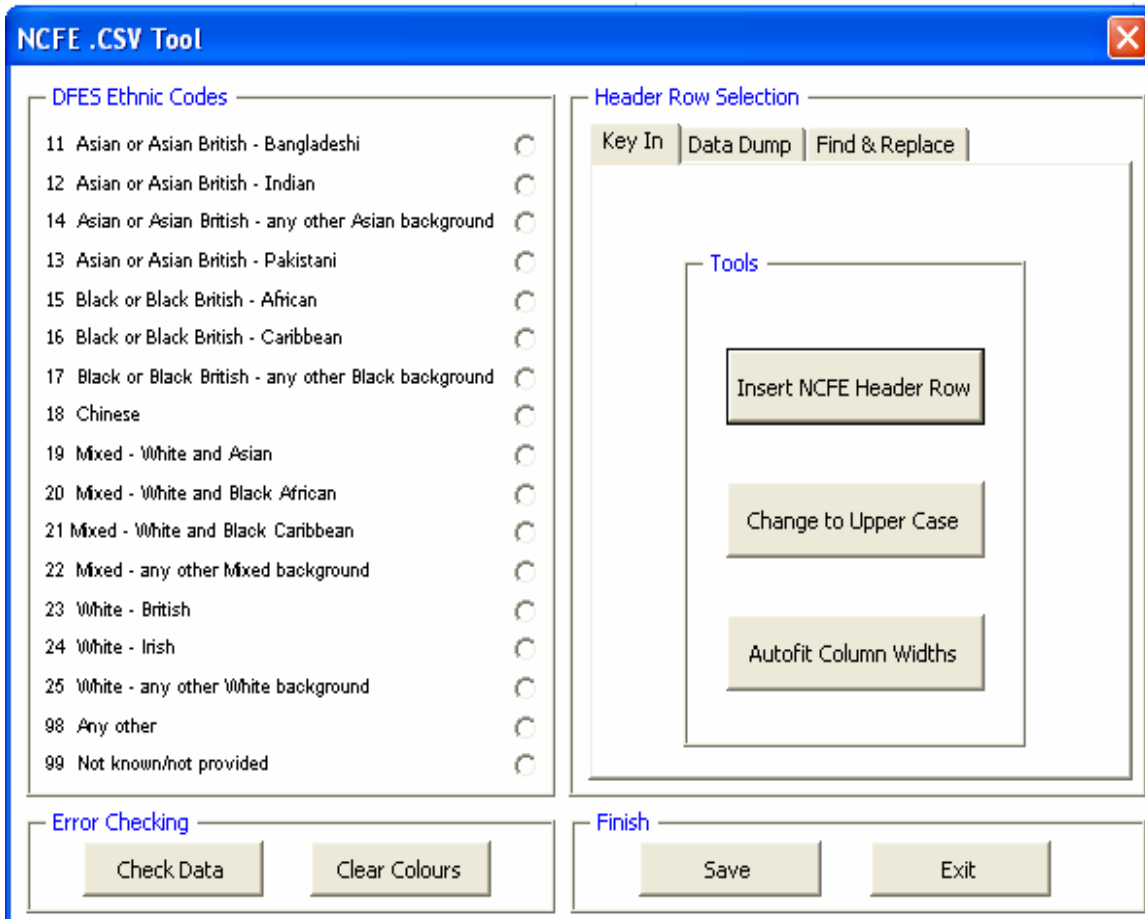
The NCFE CSV tool is designed to deal with Keyed in data and Data dumps. This section of the Users Guide will cover both aspects.

Step 1 – Activate the Form

Click on **NCFE CSV Tool** on your toolbar. A drop down menu will appear. Click on **CSV Creator**.



An interactive Form will be loaded. **Click** on the **Form** and **hold down the button**. You can now drag the Form to an appropriate area of the worksheet.

A screenshot of the 'NCFE .CSV Tool' window. The window has a blue title bar with the text 'NCFE .CSV Tool' and a close button. The main area is divided into several sections. On the left, under 'DFES Ethnic Codes', there is a list of 20 items, each with a radio button. The items are: 11 Asian or Asian British - Bangladeshi, 12 Asian or Asian British - Indian, 14 Asian or Asian British - any other Asian background, 13 Asian or Asian British - Pakistani, 15 Black or Black British - African, 16 Black or Black British - Caribbean, 17 Black or Black British - any other Black background, 18 Chinese, 19 Mixed - White and Asian, 20 Mixed - White and Black African, 21 Mixed - White and Black Caribbean, 22 Mixed - any other Mixed background, 23 White - British, 24 White - Irish, 25 White - any other White background, 98 Any other, and 99 Not known/not provided. On the right, under 'Header Row Selection', there are three tabs: 'Key In', 'Data Dump', and 'Find & Replace'. Below these tabs is a 'Tools' section containing three buttons: 'Insert NCFE Header Row', 'Change to Upper Case', and 'Autofit Column Widths'. At the bottom, there are two sections: 'Error Checking' with 'Check Data' and 'Clear Colours' buttons, and 'Finish' with 'Save' and 'Exit' buttons.

When the Form is active its border colour will be **opaque**. When a worksheet cell is selected then the Forms border colour will be **translucent**.

Step 2 - Understanding the Form Controls

DFES Ethnic Codes

- 11 Asian or Asian British - Bangladeshi
- 12 Asian or Asian British - Indian
- 14 Asian or Asian British - any other Asian background
- 13 Asian or Asian British - Pakistani
- 15 Black or Black British - African
- 16 Black or Black British - Caribbean
- 17 Black or Black British - any other Black background
- 18 Chinese
- 19 Mixed - White and Asian
- 20 Mixed - White and Black African
- 21 Mixed - White and Black Caribbean
- 22 Mixed - any other Mixed background
- 23 White - British
- 24 White - Irish
- 25 White - any other White background
- 98 Any other
- 99 Not known/not provided

The Form displays the **Ethnic Origin** Code numbers NCFE require. These numbers refer to DFES codes which replace (**A – J**) previously used by NCFE.

You will notice a number of option buttons situated next to each Ethnic Code in the (image left). These boxes can be used in conjunction with a list box on the Find & Replace tab depicted in the (image below) to allow you to Find and Replace data without having to type anything.

Header Row Selection

Key In | Data Dump | Find & Replace

Select from List

- Black Carribean
- Chinese
- Declined to say
- Indian
- Other
- White

Header Row Tabs.

Header Row Selection

Key In | Data Dump

The Header Row selection is designed for those who will be **Keying in** their data onto the spreadsheet and those who **Import** or **Data Dump** their information onto an Excel spreadsheet by selecting the appropriate tab.

Keying in Tools

Tools

Insert NCFE Header Row

Change to Upper Case

Autofit Column Widths

The tools in this section are designed to quickly set up a Header row in the required order, manipulate your text and make your data easier to read while preparing your file. Change to Uppercase and Autofit Column are **optional tools**, all data will be converted to uppercase and aligned during the save process but are included here in order that you can see how your saved file will look.

Data Dump Tools

Header Row Selection

Key In | Data Dump | Find & Replace

Mandatory Headers

- Forename
- Initial
- Surname
- DOB
- Ethnicity
- Gender

Tools

Insert Blank Header Row

Clear Header Row

Sort NCFE Mandatory Headers by Column

NCFE require the information on the spreadsheet to be in a certain order. Importing or Data Dumping information into Excel means that additional columns and different header row titles may be present and in a different order. The tools in this part of the Form are there to help you arrange your data with the minimum of fuss.

The Form has a list box with the Mandatory Header row titles required by NCFE. If you click on a cell on the spreadsheet and select one of the titles from the list it will replace the text on the spreadsheet with the title.

The Tools section allows you to insert a blank title row if your data was imported or Dumped into the spreadsheet and does not have a title row. It allows you to clear your titles and insert NCFE titles. Lastly it allows you to automatically arrange your columns into the correct order and clear all unwanted columns from the spreadsheet.

Find & Replace

The Find & Replace tools are designed to replace Ethnic Codes with DFES Code numbers. Additionally, the tool can be used to abbreviate Male & Female to (M & F).

The concept is to allow you to manipulate data without having to Key in anything. Example, **highlight** you're Ethnic Column Codes (not header title) on your spreadsheet; **click Create Unique List** and it will be populated with your information without duplicates. You then **select** an item from your **list**, **select** an **option button** on the DFES Ethnic codes list and **click the replace button**. All instances in your selected area will be replaced with the appropriate DFES number.

The same applies to Male and Female. **Click Clear Unique List** and then **Highlight** your data on the spreadsheet. **Select Create Unique list**. **Click on the Male (M) or Female (F) option button** to abbreviate your data to M or F, **click the replace button**.

The option button and choice from list must both be selected before the replace button is clicked or no replacement will be made.

Header Row Selection

Key In | Data Dump | Find & Replace

Select from List

- Black caribbean
- Chinese
- Declined to say
- Indian
- Other
- White

Tools

Create Unique List

Clear Unique List

Clear All Option Boxes

Replace

Abbreviate

Male (M)

Female (F)

Command Tools.



These tools are designed to check the information you have keyed in or Imported/Data Dumped. Errors will be highlighted in **Red** or a Message Box will pop up giving you information on the error and an action to eradicate it.

Finish Tools.

Once you have Keyed in or sorted your imported/Data Dump you will need to save it. The **Save** button will create a Folder called **NCFE CSV Files** and save the data on your spreadsheet as a *.CSV file to your C:\ Drive. To Exit without saving, click the **Exit** button at any time.



C:\ is not my Hard Disk Drive Letter



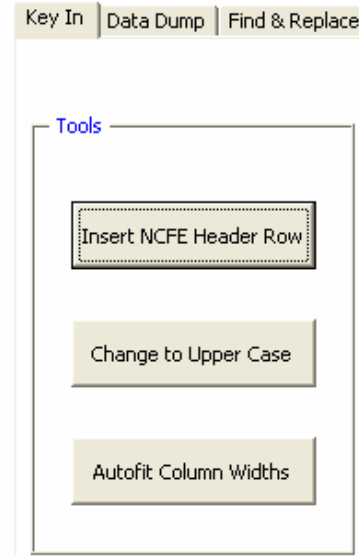
If **C:** is not your hard drive letter then you will get a pop up message (see image left) and you will be instructed to contact: (jackjoyce@ncfe.org) to report the problem.

Chapter 3 – Create a CSV file using (Key in Method)

With the NCFE CSV Form loaded, click on **Insert NCFE Header Row Button**, situated on the **Key In** tab (see image right).

The header row will be inserted in order that you can Key In your data into the correct columns. Click cell (“A2”) to activate the worksheet and begin keying in your data.

	A	B	C	D	E	F	G
1	Forename	Initial	Surname	DOB	Ethnicity	Gender	Centre Candidate ID.
2							
3							



If you are unable to key in data it is likely that you have omitted to click a cell on the worksheet. The CSV Forms border colour will still be opaque if this is the case. The worksheet will have the focus when a cell is activated and the Forms border goes translucent.

Step 1 - Mandatory Information

The fields below highlighted in **Green** are Mandatory. Those highlighted in **Yellow** are optional.

	A	B	C	D	E	F	G
1	Forename	Initial	Surname	DOB	Ethnicity	Gender	Centre Candidate ID.
2	ANN	X	AMPLE	120867	1	F	000012549

The Header row fields are mandatory and must remain in the order shown above even if you do not intend entering any data in the optional columns. The header row is only used to arrange your data in the correct order and will be deleted automatically in the save process. Your file will not save if the mandatory headers are not all present and in the correct order.

FAQ...What is Centre Candidate ID.?

NCFE assign a candidate registration number to each candidate registered. This number helps NCFE track a candidate in our database. The NCFE candidate number may not mean anything to you in respect that you use your own internal reference numbers (Centre Candidate ID.) on your database. NCFE allow you to add your own Centre Candidate ID. numbers at the point of registration in order that they are added to NCFE documents such as Candidate Status Report, External Assessment documents and Certificate Claim Forms. This makes the documents more applicable with the information held on your database.

Step 2 - Date of Birth

The NCFE Portal will only accept dates of birth in the two formats outlined below.

	A	B	C	D	E	F	G
1	Forename	Initial	Surname	DOB	Ethnicity	Gender	Centre Candidate ID.
2	ANN	X	AMPLE	120867	1	F	000012549
3	ANN OTHER	X	AMPLE	12/08/1967	1	F	000012549
4							

If you are using the 6 digit method and the Leading Zero is automatically stripped away, i.e. 011298 becomes 11298, enter (') without the brackets before your date of birth i.e. '011298.

When you eventually save your file a Date of Birth Format Check will take place. If you have entered or imported your data in a format similar to the (Image right) then you will get an error message. You can change the format to DDMMYY or DD/MM/YYYY yourself or can click on the hyperlink and download ASAP Utilities which has a function to quickly change your data format.

D
Date of Birth
03.10.1987
15.08.1976
25.01.1988
14.06.1977
16.05.1990
04.04.1988
11.04.1969
31.11.1990
05.05.1990



Step 3 - Check your input

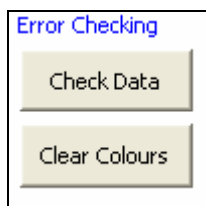
Click **Change Lower to Upper Case** button if you have keyed your data in Lower case. This is an optional tool. Your final file will automatically be converted to uppercase but is included here in order that you can preview how your final file will look.

Change to Upper Case

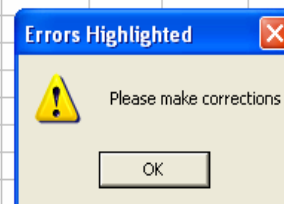
Click **Auto Fit Column Widths** button if you are unable to view all of the keyed in data correctly.

Autofit Column Widths

Click **Check Data** button to check for incorrect data or missing information. Any errors will be highlighted in **Red**. Make changes and then click **Clear Colours** button. You can click the **Check Data** button again if need be to make sure all errors have been eradicated.

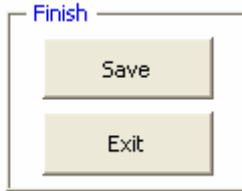


	A	B	C	D	E	F	G
1	Forename	Initial	Surname	DOB	Ethnicity	Gender	Centre Candidate ID.
2	ANN	X	AMPLE	120867	1	FEMALE	
3							
4							
5							
6							
7							
8							
9							
10							



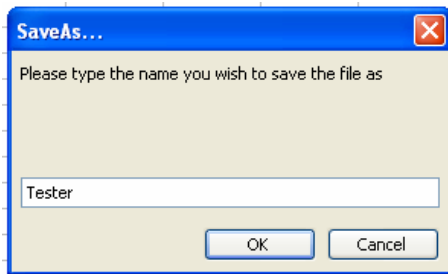
Step 4 - Save the File

Once you have checked your data and have removed any errors identified by the **Check Data button** you will want to save your file.



Step 1

When you click the **Save button** a final check will take place automatically and if errors are detected a message box will appear informing you of the problem and will give an action for you to perform to eradicate the error. If no errors are detected then you will be prompted for a name by which to save your file.



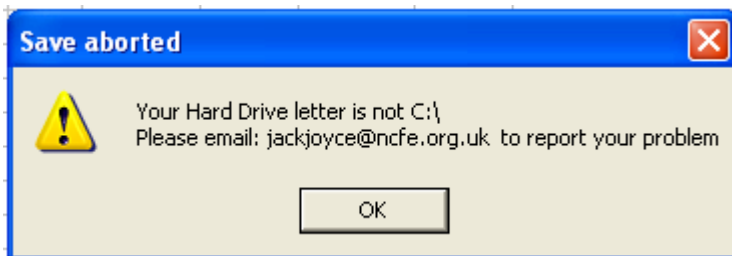
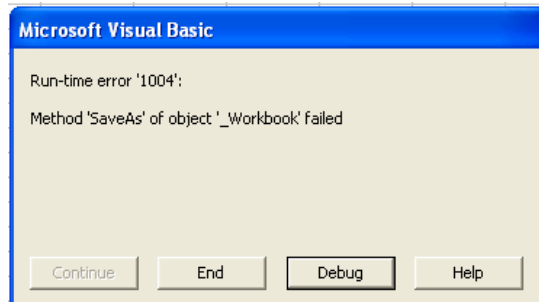
Step 2

Type a name. This can be text and numbers.

Please do not save the file with separators i.e. Tester - 31/11/2006. If you do you will get the following error message.

Step 3

If this occurs, click **End** and run the **Save button** again. When prompted for a name to save the file, enter a name without separators.



Step 4

You will get an error if your default hard drive letter is not Drive C:\. If you get this error, please contact jackjoyce@ncfe.org.uk

Step 5

If no errors have occurred you will receive a message indicating that your file has been saved in a folder on your C:\ drive called **NCFE CSV Files**. Your file is now ready to upload to the NCFE Portal as a *.CSV upload.



Chapter 4 - Create a CSV file using (Imported data or Data Dump)

Whether you use a database query to import your data to Excel or copy and paste your data directly from database tables you inevitably will have some data that needs removed or amended. The image below is an example of how your data may look.

	A	B	C	D	E	F	G	H	I	J
1	Registration No	First Name	Surname	Date of Birth	Ethnic Code	Sex	Awarding Body	Class	Site	Date of Registration
2	000012549	Suzzi	Wong	03.10.1987	Chinese	Female	NCFE	Cohrt12347	Main Campus	11.10.2006
3	000012550	Meggan	Macready	15.08.1976	White	Female	NCFE	Cohrt12347	Main Campus	11.10.2006
4	000012551	Paul	Phillips	25.01.1988	White	Male	NCFE	Cohrt12347	Main Campus	11.10.2006
5	000012552	Paula	Tismore	14.06.1977	Other	Female	NCFE	Cohrt12347	Main Campus	11.10.2006
6	000012553	Peter	Piper	16.05.1990	White	Male	NCFE	Cohrt12347	Main Campus	11.10.2006
7	000012554	Michael Mark	Keyler	04.04.1988	White	Male	NCFE	Cohrt12347	Main Campus	11.10.2006
8	000012555	Emma	Croyton	11.04.1969	Other	Female	NCFE	Cohrt12347	Main Campus	11.10.2006
9	000012556	Edward	Depp	31.11.1990	White	Male	NCFE	Cohrt12347	Main Campus	11.10.2006
10	000012557	Katie	Joans	05.05.1990	Declined to say	Female	NCFE	Cohrt12347	Main Campus	11.10.2006
11	000012558	Sophie	Simpson	12.08.1990	White	Female	NCFE	Cohrt12347	Main Campus	11.10.2006
12	000012559	Nathan	Brookes	29.01.1989	White	Male	NCFE	Cohrt12355	Satellite	11.10.2006
13	000012560	James Paul	Dean	11.06.1979	Black Caribbean	Male	NCFE	Cohrt12356	Main Campus	11.10.2006
14	000012561	Libby	Daniels	11.02.1988	White	Female	NCFE	Cohrt12356	Main Campus	11.10.2006
15	000012562	Samantha Janice	Carter	15.05.1979	White	Female	NCFE	Cohrt12356	Main Campus	11.10.2006
16	000012563	Michelle	Twain	17.04.1989	White	Female	NCFE	Cohrt12356	Main Campus	11.10.2006
17	000012564	Louise	Payne	05.05.1978	White	Female	NCFE	Cohrt12358	Satellite	11.10.2006
18	000012565	Dave	Smith	19.09.1988	Other	Male	NCFE	Cohrt12358	Satellite	11.10.2006
19	000012566	Andrew Lakeston	Palmer	28.02.1990	White	Male	NCFE	Cohrt12358	Satellite	11.10.2006
20	000012567	Pamela	Smith	07.07.1988	White	Female	NCFE	Cohrt12358	Satellite	11.10.2006
21	000012568	Hussan	Abdul	28.02.1991	Indian	Male	NCFE	Cohrt12366	Satellite	11.10.2006
22	000012569	David	James	01.01.1987	White	Male	NCFE	Cohrt12367	Satellite	11.10.2006
23	000012570	Jack	Daniels	09.03.1989	Declined to say	Male	NCFE	Cohrt12371	Main Campus	11.10.2006
24	000012571	David	Samuels	17.05.1988	Declined to say	Male	NCFE	Cohrt12371	Main Campus	11.10.2006
25	000012572	Dan	Kettle	22.12.1988	White	Male	NCFE	Cohrt12371	Main Campus	11.10.2006
26	000012573	Sandra	Morgan	01.10.1989	White	Female	NCFE	Cohrt12371	Main Campus	11.10.2006
27	000012574	Chin	Heath	02.11.1974	Chinese	Male	NCFE	Cohrt12371	Main Campus	11.10.2006
28	000012575	Mark	McManus	12.08.1967	Other	Male	NCFE	Cohrt12371	Main Campus	11.10.2006
29	000012576	John	Cooper	05.06.1989	White	Male	NCFE	Cohrt12371	Main Campus	11.10.2006

Step 1 – What information do you need in your *.CSV File?

From the Key In method described earlier you will note that NCFE requires the following information in the following order (see image below).

	A	B	C	D	E	F	G
1	Forename	Initial	Surname	DOB	Ethnicity	Gender	Centre Candidate ID.
2							
3							

Unlike the Key In method you are only going to re-arrange your data and add different headers with the help of various tools built into the Add-In. The Following sections will look at the various tools and outline how they work to quickly arrange your data and create your *.CSV file.

Step 2 – Set up your NCFE Header row

If you Import or copy data to Excel you may have a Header Row! The (image below) demonstrates that your titles and arrangement of column data will be different to NCFE requirements.

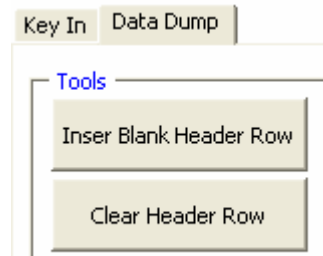
H	I	J	K	L	M
Class	Site	Date of Registration			
Cohrt12347	Main Campus	11.10.2006			
Cohrt12347	Main Campus	11.10.2006			
Cohrt12347	Main Campus	11.10.2006			
Cohrt12347	Main Campus	11.10.2006			

Header row titles will differ from NCFE requirements and Columns will also be in a different order.

Step 3 – Prepare the first row

Step 1...I have a header row

On the DataDump tab **click** on the **Clear Header Row** button in the Tools section. This clears row 1 ready for you to insert NCFE Mandatory Headers.



Step 2...I do not have a header row

Your data starts in cell ("A1") on your spreadsheet. On the **Data Dump** tab **click** on the **Insert Blank Header Row** button in the Tools section. This will insert a blank row above your data ready for you to insert NCFE Mandatory Headers.

Once the header row has been cleared or a blank row inserted we can begin entering the NCFE Mandatory Headers.

Step 4 – Select and Insert Header Titles

Click on a cell i.e. (“B1”) and then **click** on one of the **headers** listed on the scroll down list. It will insert the header into the cell for you. Continue selecting cells in row 1 and titles until all 7 titles have been inserted above the appropriate columns. The **(image below)** shows cell (“B1”) being filled with **Forename** from the scroll down list. If a mistake is made and you enter the wrong title, simply **click the cell** on the spreadsheet and **click another choice** from the scroll down list to overwrite it.

	A	B	C	D	E	F	
1	Centre Candidate ID.	Forename					
2	000012549	Suzzi	Wong	03.10.1987	Chinese	Female	NC
3	000012550	Meggan	Macready	15.08.1976	White	Female	NC
4	000012551	Paul	Phillips	25.01.1988	White	Male	NC
5	000012552	Paula	Tismore	14.06.1977	Other	Female	NC
6	000012553						
7	000012554						
8	000012555						
9	000012556						
10	000012557						
11	000012558						
12	000012559						
13	000012560						
14	000012561						
15	000012562						
16	000012563						
17	000012564						
18	000012565						
19	000012566						

NCFE .CSV Tool

DFES Ethnic Codes

- 11 Asian or Asian British - Bangladeshi
- 12 Asian or Asian British - Indian
- 14 Asian or Asian British - any other Asian background
- 13 Asian or Asian British - Pakistani
- 15 Black or Black British - African
- 16 Black or Black British - Caribbean
- 17 Black or Black British - any other Black background
- 18 Chinese
- 19 Mixed - White and Asian

Header Row Selection

Key In | Data Dump | Find & Repla

Mandatory Headers

- Forename
- Initial
- Surname
- DOB
- Ethnicity
- Gender

Initial and **Centre Candidate ID.** are included in the Mandatory Headers. You may not store candidate initials or assign the candidate a reference number and therefore may wonder why you need to include these headers or wonder where to insert them?

Where do I insert them? - Why do we need them?

It is assumed that header titles and column arrangements will be different for all our customers. Therefore to make it easy for you to re-arrange your data into the structure required by NCFE we needed a way to do this for you. Otherwise it would require interaction on your behalf in the form of inserting columns and copying and pasting information. This is time consuming and counterproductive.

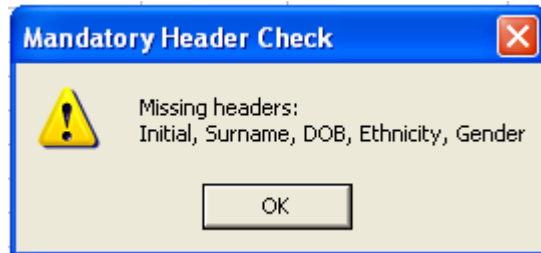
We therefore need you to insert all 7 headers in row 1. **Initial** and **Centre Candidate ID.** should be inserted above blank columns if your data does not include this information. Once all 7 headers have been inserted, **click the Sort NCFE Mandatory Headers by Column button** and your titled columns will be sorted and all other information on the worksheet will be deleted.

Sort NCFE Mandatory Headers by Column

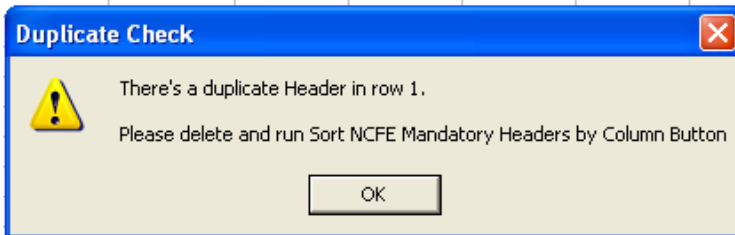
Step 5 – What happens if I make a mistake?

The sort button will not sort the columns unless all 7 mandatory titles are in row 1. You should check your information before clicking the button as to ensure you have inserted the title above a column you wish to keep. If you enter a mandatory title above a column you do not require and run the sort button you will delete all subsequent data from the spreadsheet and have to start over.

If you do not enter all 7 titles and run click the sort button you will get the following error message:



You will then need to insert the missing titles in row 1 and run click the sort button again.



If duplicate titles have been inserted then the following error message will appear. You will need to delete the duplicates and then click the sort button again.

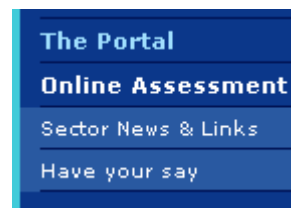
Chapter 5 – What do I do with the saved file?

Step 1 – 17 uploading your data to the NCFE Portal

Once you have successfully saved your Keyed in or Data Dump file as a *.CSV file then you are ready to upload the file to the NCFE Portal.

Step 1...

Go to <http://website.ncfe.org.uk/> and **click** on **The Portal**



Step 2 ...

Username	<input type="text" value="your user name here"/>
Password	<input type="password" value="••••••••"/>
<input type="button" value="LOGIN >"/>	

Type in your **Username** and **Password** & **click** on **Login**

Step 3...

You will see the next screen explaining about NCFE's strive to reduce paperwork.

Too much paper..? (Posted: 31/01/2005)

Following feedback from centres that we have been sending you too much paperwork system.

This means that you **MUST** download your paperwork because NCFE **DO NOT** se

Form C (*Certification Claim Form*)

Form D (*External Assessment Request Form*)

Registration Invoice - Please pass to your Finance Team for payment

Candidate Status Report

Form E (*Exemption Claim Form*) - Key Skills only

Form P (*Portfolio Moderation Form*) - Key Skills only

For further information or advice please contact your Processing Centre Contact.

[Continue](#)

Step 4...

Click on the **Continue** link to move forward.

You will then see the following screen. **Click** on **Submit Candidates** to move forward.

- [submit candidates](#) for an award/qualification (Registration)
- [search](#) for candidate data or approvals at your centre (Queries)
- [view](#) award/qualification information and download and/or order hard copies of CIPs
- [submit Form D](#) online (Entries for Assessment)
- [submit Proxy Entries](#) online (Key skills only)
- [submit Portfolio Moderations](#) online (Key skills only)
- [Create NCFE Block Registrations](#)

Step 5...

You can submit candidates

- [key in](#) candidate data
- [csv upload](#) of candidate data

You will be presented with two choices, Key In or CSV Upload. **Click** on **CSV Upload** to move forward.

Step 6...

Next **click** on the **Start** button to move forward.

Start

Step 7...

Select the address you want to use:

Address 2: St James' Boulevard
Address 3: Newcastle Upon Tyne
Address 4:
Address 5:
Post Code: NE1 4JE

Your Centre address will be displayed. You have the option to select an alternative address from the drop down list. Once you have made your selection, **Click** on **Proceed** button to move forward.

Step 8...

You will need to select the category in which our Award or Qualification resides. Select the category to move forward.

- [CUSTOMISED](#)
- [IIQ](#)
- [LEGACY SCHEMES](#)
- [NATIONAL AWARD](#)
- [NATIONAL PARTNERSHIP AWARD](#)
- [IIOF](#)
- [PILOT](#)

Step 9...

- [IIOF - approved schemes only](#)
 - [100/0798/2 LEVEL 1 KEY SKILLS IN APPLICATION OF NUMBER](#)
 - [100/0799/4 LEVEL 2 KEY SKILLS IN APPLICATION OF NUMBER](#)
 - [100/0800/7 LEVEL 3 KEY SKILLS IN APPLICATION OF NUMBER](#)
 - [100/0801/9 LEVEL 4 KEY SKILLS IN APPLICATION OF NUMBER](#)

Choose the qualification you wish to enter your candidate registrations on to move forward.

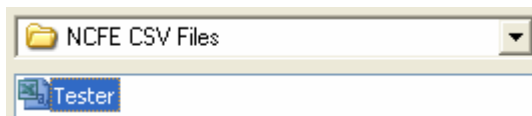
Step 10...

Click on **Browse**. You will be able to navigate to your saved file.

Upload .csv file:

The centre candidate ID must be unique to the candidate

Step 11...



Navigate to **C:\NCFE CSV Files** & **click** on the file you created earlier.

Step 12...



Click Open to upload your file.

Step 13...

The pathway of your file will now be in the **Browse text box**.

Upload .csv file:

C:\NCFE CSV Files\Test Browse...

The centre candidate ID must be unique to the candidate

Step 14...

Upload

Move to the bottom of the page and complete your upload by clicking on the Upload Button.

Step 15...

Click on **Process** to move forward.

Centre No	Centre Ref	NCFE Batch No	Product Code
039870			100/0801/9
ANN X AMPLE			

Process >>

Step 16...

You will be presented with a preview of your uploaded details. A check for duplicate candidates is made at this time automatically. Rows will be coloured in **Yellow** and you will need to select **Delete Candidate?** And then **click Submit** to delete the duplicate candidate. You will be redirected back to the preview page and the line(s) of data will have been removed.

Details of candidates:

Warning - Please note, once the submit button has been pressed, these candidates will be registered and you will be invoiced for registration

Forename	Initial	Surname	DoB	Ethnicity	Gender	Delete Candidate?
ANN	X	AMPLE	11051985	White - British	Female	<input type="checkbox"/>

Warning - Please note, once the submit button has been pressed, these candidates will be registered and you will be invoiced for registration

Step 17...

Once you are happy with the data, **click Submit** and you will receive an NCFE batch number. Your candidates are now registered. You should download documents associated with the registration by clicking on the links applicable to the qualification, (see image below).

Your batch of candidates have the batch number of 8051186.07.

You **MUST** download the paperwork. NCFE do not send hard copies of the paperwork. It is very important that you pass the invoice to your Finance team for payment.

Please click here to download your [Candidate Status Report](#), [Form D](#), [Form E](#), [Form P](#), and for your [Invoice](#).

Congratulations...

The process is complete, you have successfully created a *.CSV file and uploaded it to the NCFE Portal. Whether you chose the **Key In** method or **Data Dump**, you will save time in the long term and avoid problems such as Duplicate Registration costs.

If there are any features you dislike about the *.CSV Tool or features you think would be beneficial if they were added, please email: jackjoyce@ncfe.org.uk