

UCAS

---

# COLLECTION TOOL SUPPORT GUIDE





<b>1. Introduction.....</b>	<b>1</b>
<b>2. Accessing the collection tool.....</b>	<b>2</b>
<b>3. User management .....</b>	<b>2</b>
<b>4. Provider management .....</b>	<b>4</b>
a. Provider details .....	4
b. Course contacts .....	4
c. Clearing contacts.....	5
d. Departments .....	5
e. Locations.....	5
f. Fees and English Language Requirements.....	6
<b>5. Course management .....</b>	<b>6</b>
a. Course management page.....	6
b. Create a new course .....	8
c. Add outcome qualification.....	11
d. Course options.....	12
e. Publishing courses .....	14
f. Open for application.....	14
g. Amend vacancies .....	15
h. Standard qualification requirements .....	15
i. Additional requirements .....	16
j. Course statuses and their outcomes .....	17
k. Editing a course .....	17
<b>6. Roll over courses to a new cycle.....</b>	<b>18</b>
<b>7. Bulk updating course information.....</b>	<b>20</b>
<b>8. Reporting (including Unistats data).....</b>	<b>22</b>
<b>9. Collection tool tips for 2024/2025.....</b>	<b>24</b>



## 1. INTRODUCTION

In the collection tool, you can add and manage course and provider information. The data feeds into search and discover tools, which prospective applicants and advisers use to search for courses.

It's important that your course and provider information is maintained in the collection tool and:

- ▶ is as current and complete as possible
- ▶ meets UCAS' **data standards**, as agreed in our terms and conditions of service – the system will give a warning if data fails validation
- ▶ is compliant with legal requirements, such as consumer protection laws, e.g. the requirements set out by the Competition and Markets Authority (CMA)

If you have any feedback on areas you would like us to cover in future versions of this guide, please contact us at [coursesdata@ucas.ac.uk](mailto:coursesdata@ucas.ac.uk).



## User management

### Add user

 Enter the email address of the person you wish to add as a new user. This will not send them an email.

Email address

**User management**

Manage users at this provider

**Application management (PGAMS)**

Manage postgraduate applications to this provider

View postgraduate applications to this provider

Manage undergraduate applications to this provider

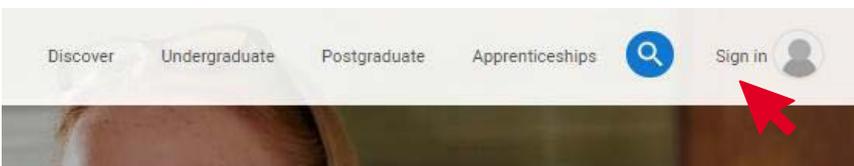
**Course management**

Manage undergraduate courses at this provider

Manage postgraduate courses at this provider

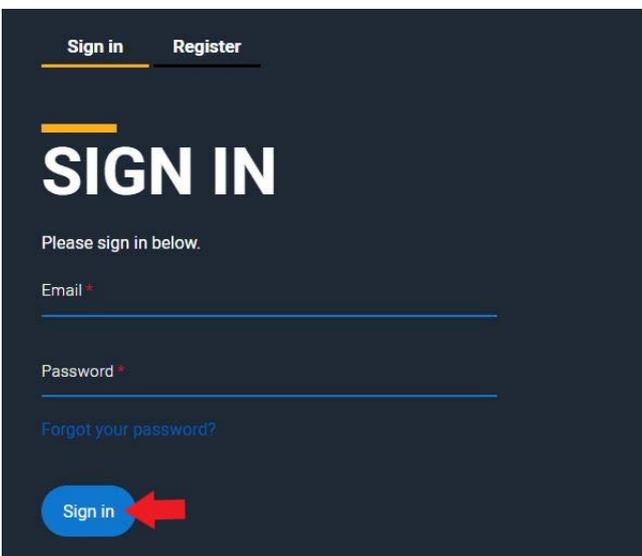
Manage conservatoires courses at this provider

This will not generate an email to the new user. Instruct the new user to go to **www.ucas.com**, click **'Sign in'** from the top-right corner of the screen.



Click **'Register'** and follow the instructions to create sign in details. An automated email will be sent to the new user containing a link to **'Activate account'**. Clicking this link will complete the registration process.

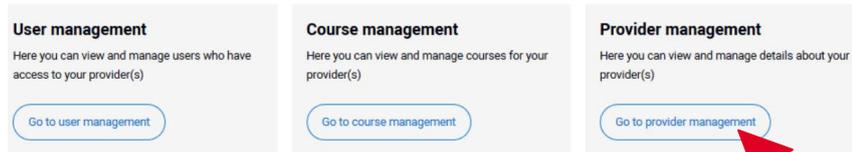
Once registered, return to the sign in page, enter the email address you registered with and your password, and click **'Sign in'**.

A screenshot of the UCAS 'Sign in' page. The page has a dark blue background. At the top, there are two tabs: 'Sign in' (selected) and 'Register'. Below the tabs is a large white 'SIGN IN' heading. Underneath, it says 'Please sign in below.' There are two input fields: 'Email \*' and 'Password \*'. Below the password field is a link that says 'Forgot your password?'. At the bottom left, there is a blue 'Sign in' button with a white arrow pointing to it from the right.

Please note that UCAS are unable to create user accounts for agencies or third parties who may be managing your course data, without express permission from a registered user manager or Primary Correspondent at your provider.


# 4. PROVIDER MANAGEMENT

To access your overarching provider information, click the 'Provider management' option on the collection tool dashboard.

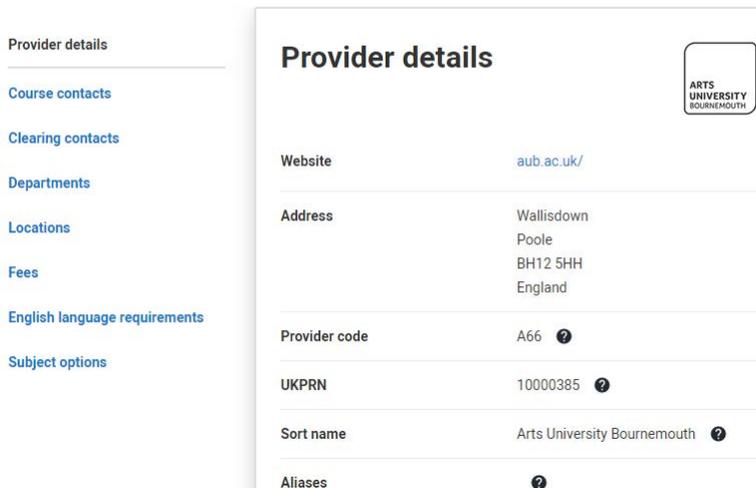


## ► 4a. Provider details

The first screen shows your main provider details. To amend this information, e.g., your logo, address or website, please email [coursesdata@ucas.ac.uk](mailto:coursesdata@ucas.ac.uk).

The 'Aliases' field can be used to add an alternative name that your provider is commonly known as and searched for by. An alias is used as an alternative term or abbreviation to find a course provider in the search and discover tools. Location names are picked up from the locations section in provider management and shouldn't be used as aliases.

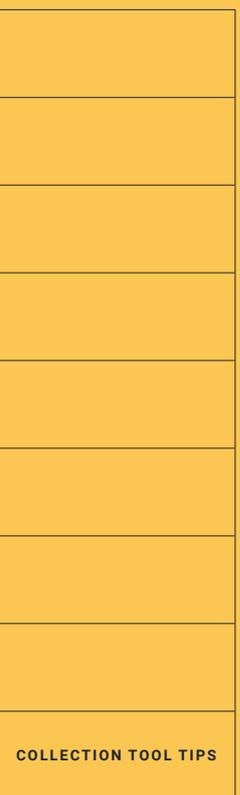
## Provider management Arts University Bournemouth



The following options are available in the submenu on the left side of the page:

## ► 4b. Course contacts

Here you can enter your applicant-facing contact information, which is displayed in the UCAS search and discover tools. You can list your general admissions contacts or specific contacts within schools or faculties.





You can add a 'Location category' to indicate whether the location is a 'Main site,' 'Campus,' 'Franchise location,' or 'College (College group).' If 'Franchise location' or 'College Group' is selected a specific location url and logo can be assigned.

## Provider management

### Arts University Bournemouth

#### ► 4f. Fees and English Language Requirements

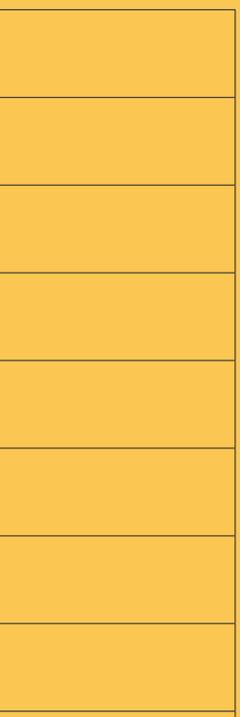
You can specify the cost of tuition for a course and any other other additional costs that the applicant should be aware of. Here you can create a fee template and then copy the data from a template to courses in bulk by using the 'Copy to courses' button.

Similarly, you can add requirements relating to specific English language tests by creating a template and then copying the data from the template to selected courses.

## 5. COURSE MANAGEMENT

#### ► 5a. Course management page

The new course management homepage is your starting point for accessing and amending course and vacancy information.



To access your course list, click the **'View all courses'** button. From here, you can view the status of your courses in various formats.

The search field at the top of the page can be used to find assigned course details, e.g. course title, internal reference code or application code. This will display all unarchived versions of the course, across all intakes.

## Course management

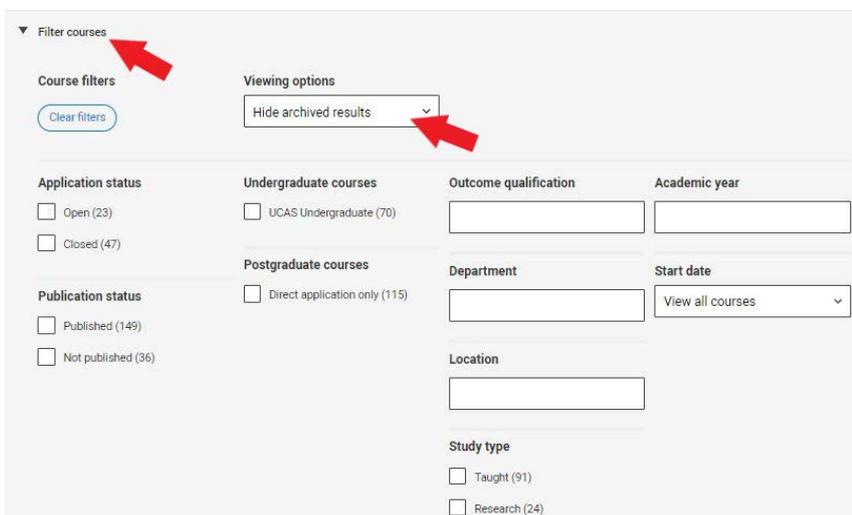


At the top right of the page, there is a menu signified by three dots. The menu has three options -

- ▶ **Bulk management** – for updating the status or information of several courses, or rolling over course information from one intake year to another.
- ▶ **Download courses** – for producing and downloading a CSV report of your course information across several pre-set options.
- ▶ **Statistics** – a quick and easy way to assess and check the status of courses. Graphs are provided across schemes and intakes to show options, such as number of courses, published or unpublished, or open or closed vacancy status.

On the course management page, you can view your courses across all intakes. By default, archived courses are hidden from view. If you would like to view your archived courses, click the **'Filter courses'** option below the search field. Select the drop-down menu below **'View options'**, and choose **'Show archived results'**.

Other filters are available, including academic year, outcome qualification, scheme, department, location and application/publication status. These filters will affect the course list that displays below the 'filter courses' option.















## ► 5e. Publishing courses

The default status of your newly created course option will be:

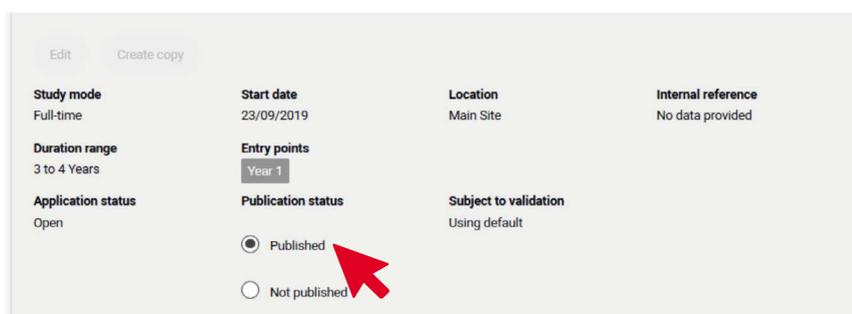
Application status: **'Closed'**

Publication status: **'Not published'**.

Therefore, it will not display in the UCAS search and discover tools, or be selectable in the UCAS application.

To set the status to published, go to the **'Bulk actions'** drop-down menu directly above the first course option in your list. Select **'Publication status'** and click **'Go'**.

The following published/not published radio buttons will be displayed. Make your selection and click **'Save'**.



The screenshot shows a course management interface with the following details:

Study mode	Start date	Location	Internal reference
Full-time	23/09/2019	Main Site	No data provided

Duration range	Entry points
3 to 4 Years	Year 1

Application status	Publication status	Subject to validation
Open	<input checked="" type="radio"/> Published <input type="radio"/> Not published	Using default

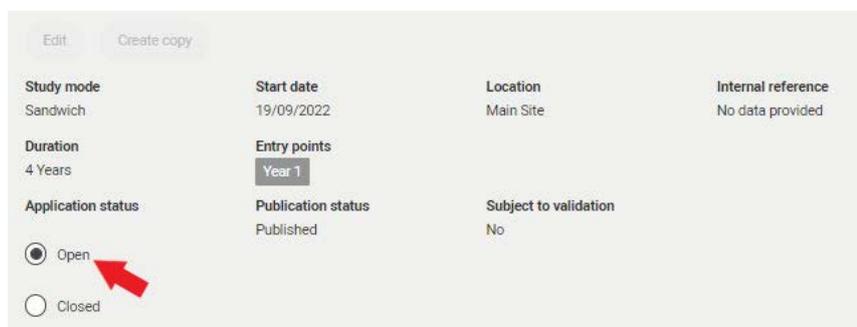
A red arrow points to the 'Published' radio button.

## ► 5f. Open for application

Changing the application status of a course option to open is necessary for it to appear as an available selection in the UCAS application.

To amend the application status to **'Open'** go to the **'Bulk actions'** drop-down menu directly above the first course option in your list. Select **'Application status'** and click the **'Go'** button.

The following open/closed radio buttons will be displayed. Make your selection and click the **'Save'** button.



The screenshot shows a course management interface with the following details:

Study mode	Start date	Location	Internal reference
Sandwich	19/09/2022	Main Site	No data provided

Duration	Entry points
4 Years	Year 1

Application status	Publication status	Subject to validation
<input checked="" type="radio"/> Open <input type="radio"/> Closed	Published	No

A red arrow points to the 'Open' radio button.

The application status, archive status, publication status and vacancy status can also be bulk updated through the **'Course management'** section under **'Bulk update course status'**.



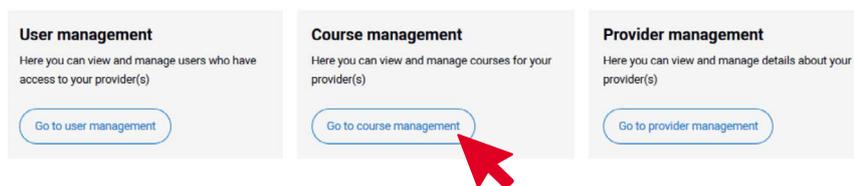




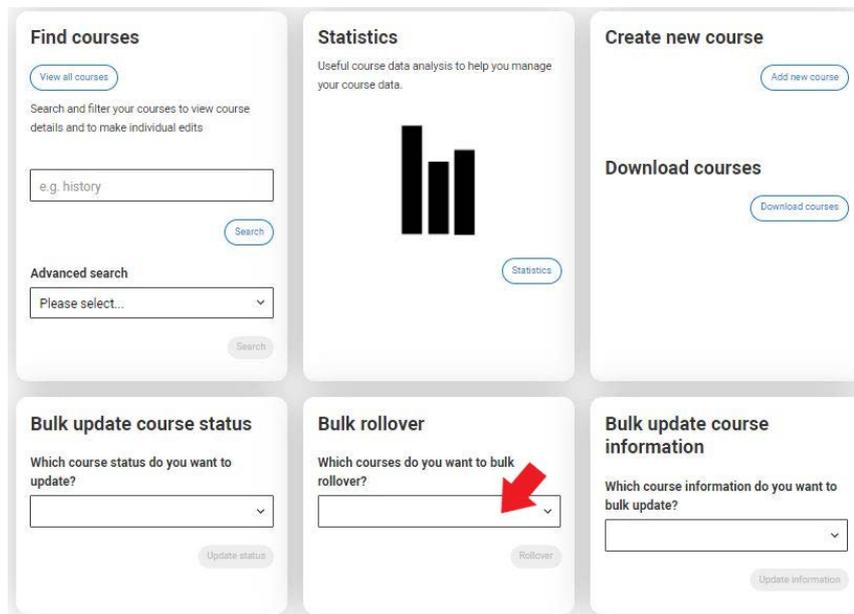
## 6. ROLL OVER COURSE OPTIONS TO A NEW CYCLE

Course profiles in the collection tool belong to one or more specific academic years. Each May, the following year's list of courses will 'go live' in UCAS' search and discover tools and Undergraduate application, with Conservatoires application going live in July. Leading up to this we request that all providers roll over their course list from one year to the next and make any required updates so that the search and discover tools are populated with accurate course information. Please be aware, if you do not roll over your courses to the following intake, applicants will be unable to search or apply to your courses for that year.

To roll over courses in bulk on the collection tool you'll need to select '**Course management**' from your dashboard.



On the courses home page scroll down to the '**Bulk rollover**' tile. Select the correct scheme and click '**rollover**'.



On the next screen select the year you are copying from (your source year) in the drop-down menu. Click the '**Next**' button that appears in the top right of your screen.

Search for the appropriate course(s) and click the corresponding tick box. Alternatively you can use the '**Select all**' button to indicate all the courses listed. Use the filters below the search field to narrow down the results, e.g. '**Department**' or '**Publication Status**'. Once you've chosen the courses you want to roll over, click '**Review**'.







Once you've chosen the option to bulk update, select the **'Next'** button displayed in the top right corner. From here you can amend the status – for example, **'Open to applications'** or **'Close to applications'**.

## Bulk course management



Once selected, click the **'Next'** button in the top right of the page.

You'll be presented with all the courses available to bulk update.

If a course is missing, it's because it already has the status you're trying to assign to it.

Use the filter to narrow down course types, e.g. academic year, scheme or location.

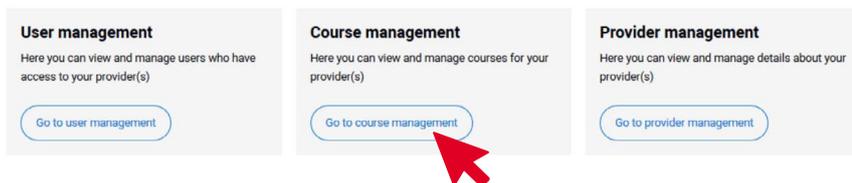
Either click the individual course's tick box to make your selection or choose the **'Select all'** option above the course list. Once selected, a Review (x) in the top right of the page is displayed. Click this and you'll receive a list of chosen courses.

Check the list to ensure you're selecting the correct courses.

Once you've clicked **'Confirm'**, a window will appear to confirm the updated status.

## 8. REPORTING

The collection tool has the functionality to assist you with your course management. To access the available reports, select **'Go to course management'** from your dashboard.



On the course management page you'll see three dots '...' from here, click the three dots in the right corner to reveal a menu.



Once selected, the three dots will display a menu with three options –







© UCAS 2020

All rights reserved.

UCAS is a registered trademark.

UCAS, a company limited by guarantee, is registered in England and Wales.

Registered number: 2839815.

Registered charity number: 1024741 (England and Wales) and SC038598 (Scotland).

We have made all reasonable efforts to ensure the information in this publication was correct at time of publication. We will not, however, accept any liability for errors, omissions, or changes to information since publication. Wherever possible, any changes will be updated on the UCAS website ([www.ucas.com](http://www.ucas.com)).

UCAS