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## Making entries for Young Enterprise qualifications via Interchange

A step-by-step guide for centres



Welcome to Intercha

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## Introduction

This guide demonstrates how to make entries for Young Enterprise qualifications via Interchange.

### Interchange

For help getting started with Interchange, please see our quick start guide

### Interchange quick start guide

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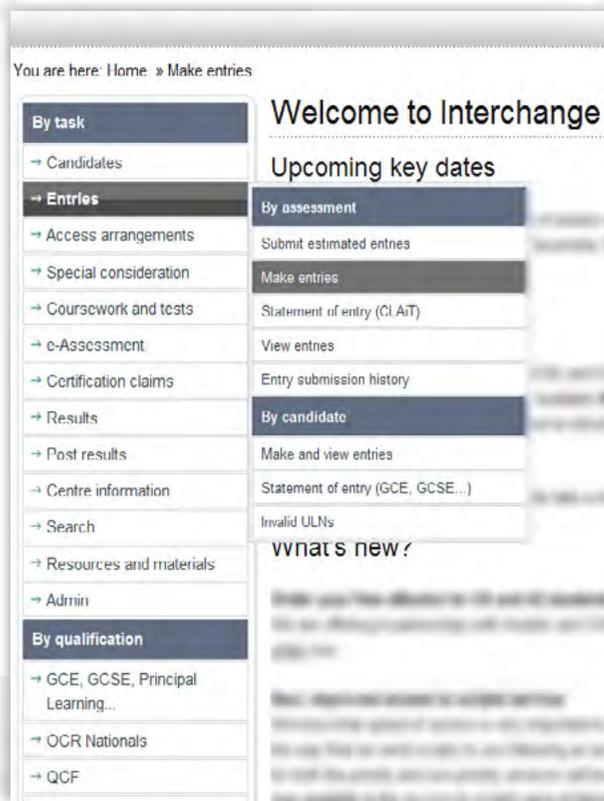
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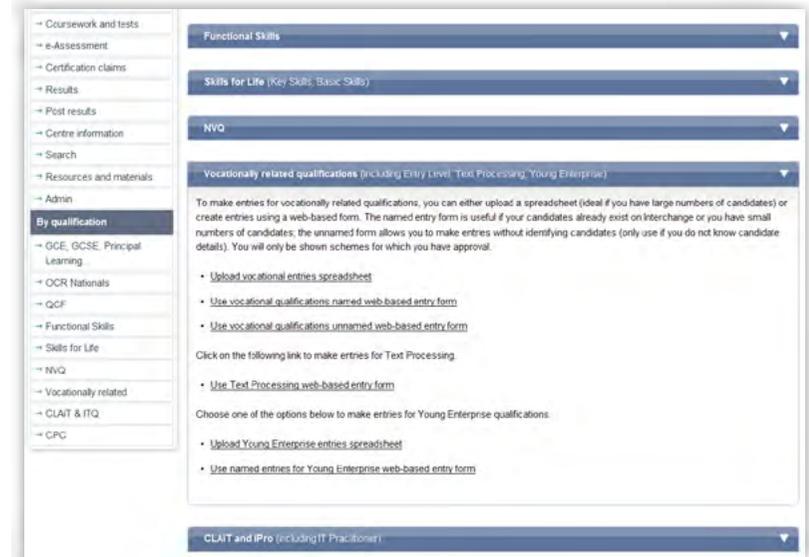
## Log in to Interchange

To get started, log in to Interchange, hover over 'Entries' in the left-hand menu and then click on 'Make entries'. Next, click on 'Vocationally related qualifications'. You then need to choose your entry method – the entries spreadsheet or a named web-based form.

Choose 'Entries' from the left-hand menu



Choose entry method



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## Uploading a spreadsheet (named entries)

### Download and complete the entries spreadsheet

This method is ideal if you have large numbers of candidates. Click on 'Upload Young Enterprise entries spreadsheet' and then download the spreadsheet from the following page, saving it in a secure location on your computer. Complete the spreadsheet – either manually or by importing data from your management information system.

**Note:** If you need help filling out the spreadsheet, read the instructions on how to complete it by clicking on the help link (delete this line from the spreadsheet before you submit it).

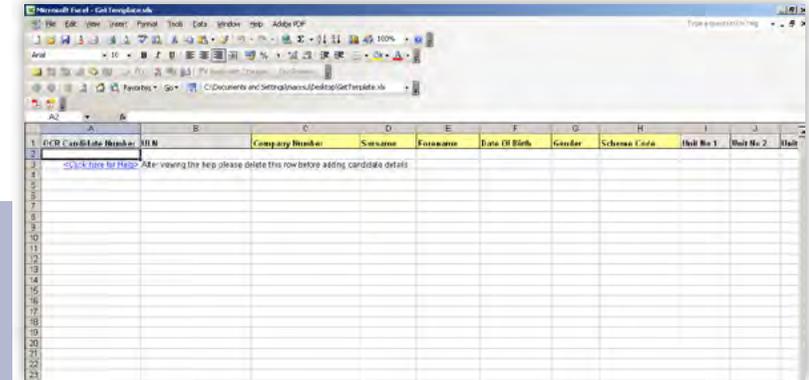
Remember that some of the fields are mandatory (shown in yellow) and, for Young Enterprise qualifications, you **must** provide a company number.

When you have completed the spreadsheet, please save it in either **XLS** or **CSV** format. Next, click on 'Browse' to find your saved spreadsheet, add an order number or reference in the box provided and then click on 'Submit entries spreadsheet'.

#### Download spreadsheet



#### Complete spreadsheet



### Spreadsheet validation

Once you've clicked 'Submit entries spreadsheet', Interchange will automatically validate the information. Any errors will show up in red. You will need to correct these before your entries can be processed. If necessary, make the amendments to your entry information and then click on 'Submit'.

**Note:** You can only enter candidates for qualifications you have full approval for.

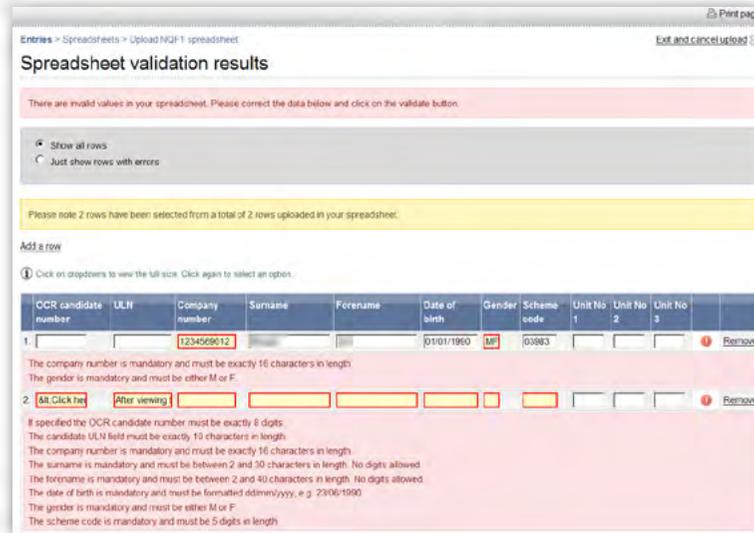
You will then see a confirmation page where you can download a copy of your entries for your records.

**Note:** Please allow 6–10 working days for initial entries to be processed.

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### Spreadsheet validation



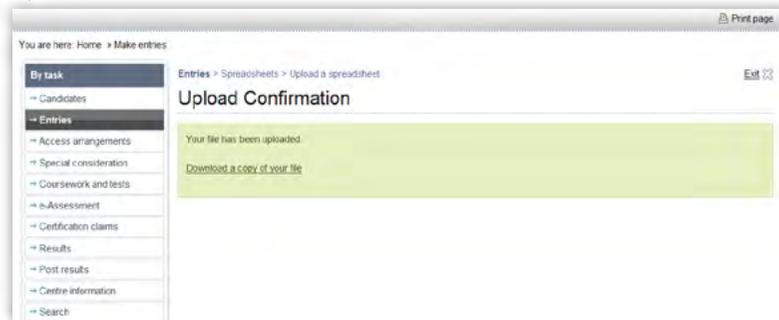
The screenshot shows the 'Spreadsheet validation results' page. At the top, a red banner states: 'There are invalid values in your spreadsheet. Please correct the data below and click on the validate button.' Below this, there are radio buttons for 'Show all rows' (selected) and 'Just show rows with errors'. A yellow banner notes: 'Please note 2 rows have been selected from a total of 2 rows uploaded in your spreadsheet.'

The main content area is titled 'Add a row' and includes a tip: 'Click on dropdowns to view the full size. Click again to select an option.' Below this is a table with the following columns: OCR candidate number, ULN, Company number, Surname, Forename, Date of birth, Gender, Scheme code, Unit No 1, Unit No 2, Unit No 3, and a 'Remove' button. Row 1 shows an error in the 'Company number' field (1234569012), with a red box around it and a 'Remove' button. Row 2 shows errors in the 'OCR candidate number' and 'Uln' fields, with red boxes around them and a 'Remove' button.

Below the table, a list of validation rules is provided:
 

- The company number is mandatory and must be exactly 16 characters in length.
- The gender is mandatory and must be either M or F.
- If specified the OCR candidate number must be exactly 8 digits.
- The candidate Uln field must be exactly 19 characters in length.
- The company number is mandatory and must be exactly 16 characters in length.
- The surname is mandatory and must be between 2 and 30 characters in length. No digits allowed.
- The forename is mandatory and must be between 2 and 40 characters in length. No digits allowed.
- The date of birth is mandatory and must be formatted dd/mm/yyyy, e.g. 23/06/1990.
- The gender is mandatory and must be either M or F.
- The scheme code is mandatory and must be 5 digits in length.

### Upload confirmation



The screenshot shows the 'Upload Confirmation' page. On the left, there is a 'By task' sidebar with a list of tasks: Candidates, Entries (selected), Access arrangements, Special consideration, Coursework and tests, e-Assessment, Certification claims, Results, Post results, Centre information, and Search. The main content area is titled 'Upload Confirmation' and features a green banner with the message: 'Your file has been uploaded.' Below the banner is a link to 'Download a copy of your file'.

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## Using the web-based form (named entries)

This method is useful if your candidates already exist on Interchange or you only have a few candidates to enter. Click on the 'Use named entries for Young Enterprise web-based entry form' link.

### Select assessment

Select the qualification you require from the dropdown list and click 'OK'.

Select assessment



### Select candidates

Next, you need to select your candidates. You can do this by choosing individual candidates or whole candidate groups. You should select existing candidates rather than creating new ones; however, if you cannot find a candidate, you can enter their details.

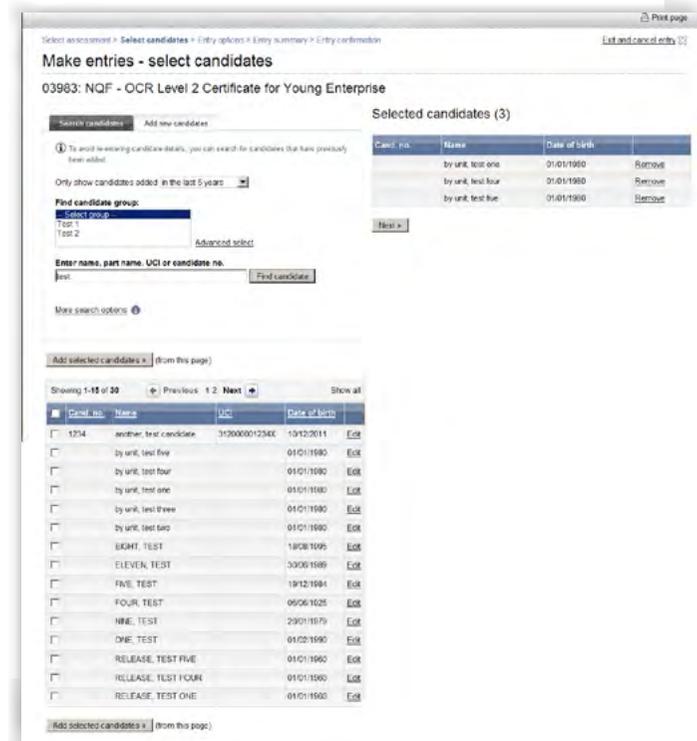
**Note:** You can create bespoke candidate groups within Interchange, tailored to include candidates of your choice. To create a bespoke candidate group, log in to Interchange, hover over 'Candidates' in the left hand menu and click on 'Candidate groups'.

When searching for existing candidates, you can restrict the search to show only candidates added during a given time period, from 'today' to 'in the last five years'. You can also find the candidate by searching for their name, part name, UCI or candidate number. Enter your search criteria and click 'Find candidate'.

**Note:** If your search returns multiple results, you can arrange them by clicking on any one of the following column headings: *Candidate number, Name, UCI or Date of birth*.

Next, select the candidate you would like to make entries for by clicking in the tick box next to their details and then clicking the 'Add selected candidates' button. These candidates will then appear in the list on the right-hand side of the screen. Once you have selected all the candidates you need, click 'Next'.

Select candidates



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### Select entry options

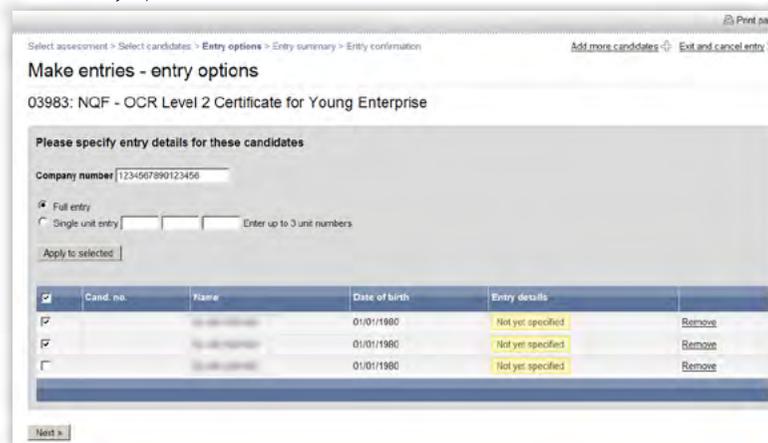
You will then be asked to select your entry options for each candidate.

**Note:** Young Enterprise qualifications are single-unit qualifications so you must choose the **full award entry** option for all candidates. In addition, you must provide a **company number** for each candidate (different company numbers can be used for different candidates).

First, insert a company number in the box provided and click the 'Full entry' radio button. Next, tick the box for each candidate you want to enter for this company number. **Remember, you can use different company numbers for different candidates.** To apply the changes, click on 'Apply to selected'.

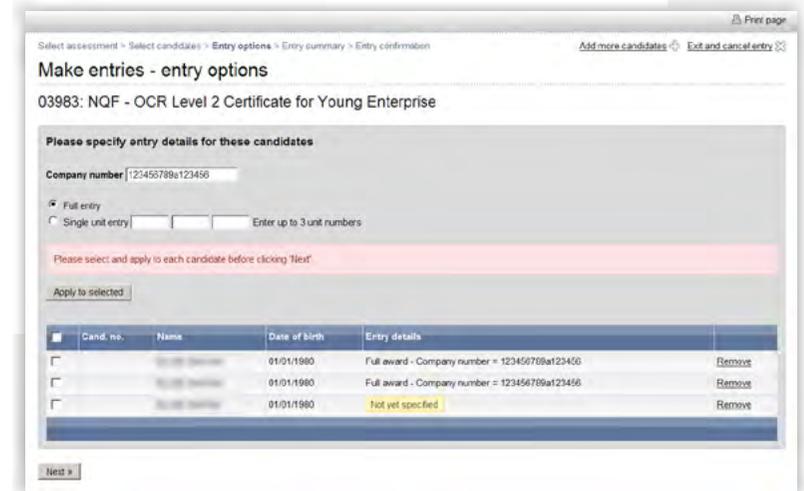
Repeat this process until you have input entry options for all candidates in the list and, once you're finished, click 'Next'.

### Select entry options



Cand. no.	Name	Date of birth	Entry details	
<input checked="" type="checkbox"/>	Full name	01/01/1980	Not yet specified	Remove
<input checked="" type="checkbox"/>	Full name	01/01/1980	Not yet specified	Remove
<input type="checkbox"/>	Full name	01/01/1980	Not yet specified	Remove

### Select entry options



Cand. no.	Name	Date of birth	Entry details	
<input type="checkbox"/>	Full name	01/01/1980	Full award - Company number = 1234567890123456	Remove
<input type="checkbox"/>	Full name	01/01/1980	Full award - Company number = 1234567890123456	Remove
<input type="checkbox"/>	Full name	01/01/1980	Not yet specified	Remove

### Submit your entries

You will then see the entry summary screen. Here, you can review the details of your entries before submitting them.

**Note:** If any of these details are incorrect, you must amend them **before** you submit. If you want to go back and amend the entry details, click on the relevant link on the right-hand side of the screen ('Change entry options', 'Add more candidates' or 'Exit and cancel entry') or, if you simply want to remove a candidate from the entry, click 'Remove' next to their name.

You can enter an order number/reference here if you wish. The order number will be quoted on your centre's invoice.

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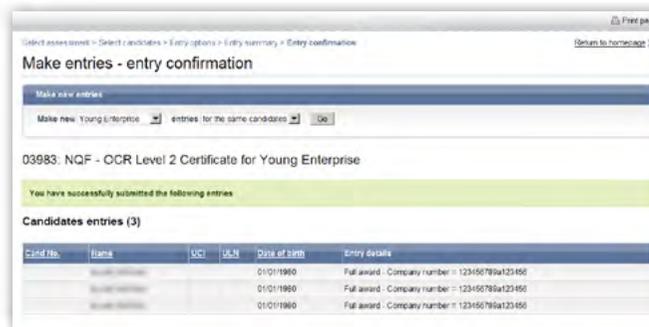
Once you've checked the details, added an order number/reference (if necessary) and you're happy that everything is correct, click on 'Submit entries' to submit your Young Enterprise entries.

You will then see a confirmation page.

*Submit your entries*



*Entry confirmation*



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## Viewing entries

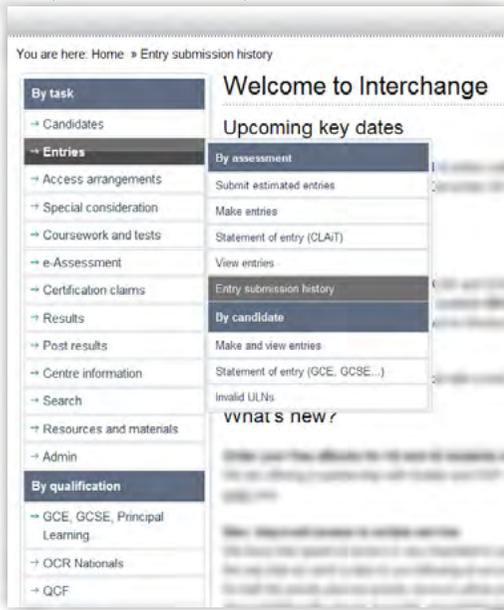
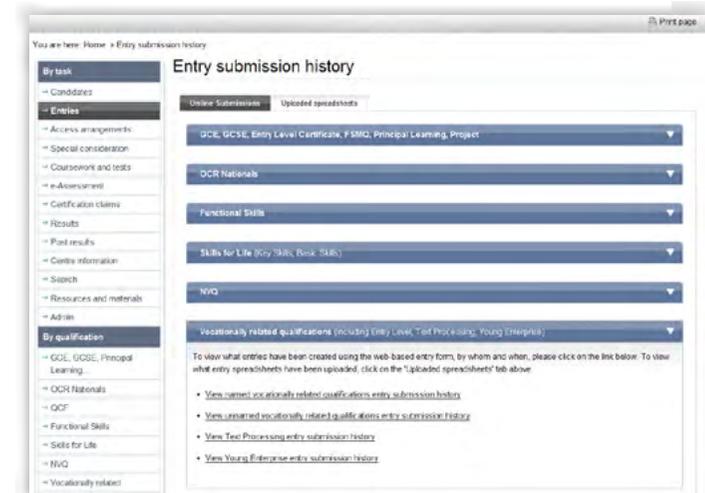
You can view all entry information within Interchange. To access this area, hover over 'Entries' in the left-hand menu and then click on 'Entry submission history'. Click on the 'Vocationally related qualifications' heading – from here, you can view details of all Young Enterprise entries.

There are two tabs on this page – 'Online Submissions' and 'Uploaded spreadsheets'. The 'Online Submissions' tab is the default.

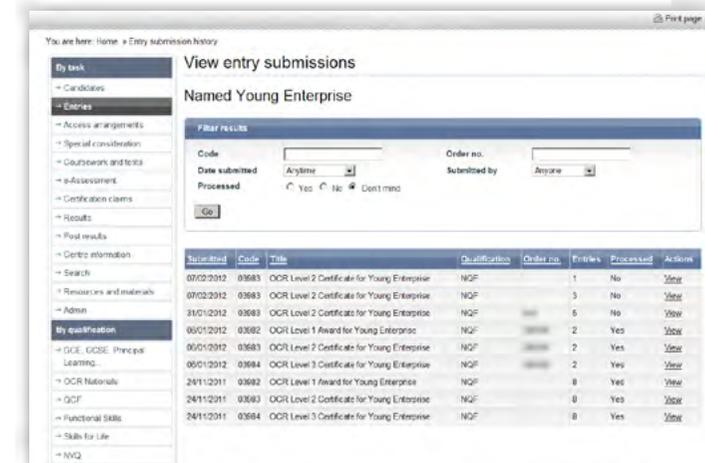
If you've submitted your entries using the web-based form, click on the 'View Young Enterprise entry submission history' link. You will then see a list of all named entries, with the most recent at the top of the list.

You can filter the results by selecting a date range and order number (if applicable). To view the entries, click on 'View details' in the 'Action' column.

### Entry submission history

### Entry submission history (search results)



Submitted	Code	Title	Qualification	Order no.	Entries	Processed	Actions
07/02/2012	03683	OCR Level 2 Certificate for Young Enterprise	NQF		1	No	View
07/02/2012	03683	OCR Level 2 Certificate for Young Enterprise	NQF		3	No	View
31/01/2012	03683	OCR Level 2 Certificate for Young Enterprise	NQF	Yes	5	No	View
06/01/2012	03682	OCR Level 1 Award for Young Enterprise	NQF	Yes	2	Yes	View
06/01/2012	03683	OCR Level 2 Certificate for Young Enterprise	NQF	Yes	2	Yes	View
06/01/2012	03684	OCR Level 3 Certificate for Young Enterprise	NQF	Yes	2	Yes	View
24/11/2011	03682	OCR Level 1 Award for Young Enterprise	NQF	Yes	8	Yes	View
24/11/2011	03683	OCR Level 2 Certificate for Young Enterprise	NQF	Yes	8	Yes	View
24/11/2011	03684	OCR Level 3 Certificate for Young Enterprise	NQF	Yes	8	Yes	View

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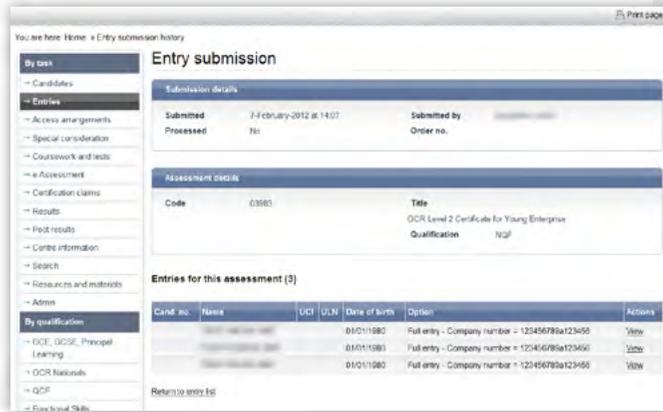
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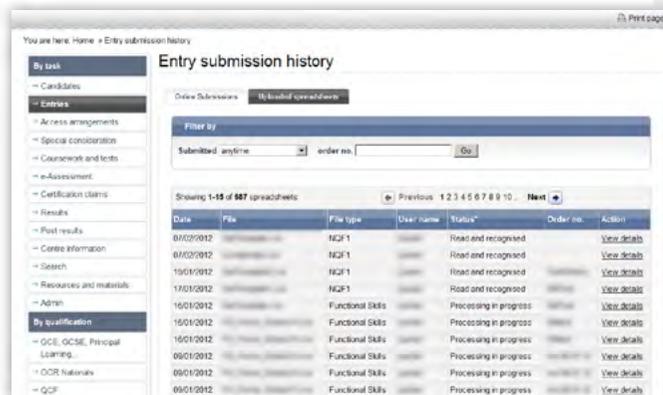
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View entry details



If you've submitted your entries using the spreadsheet, click on the 'Uploaded spreadsheets' tab. You will then see a list of all named entries submitted by spreadsheet, with the most recent at the top of the list. An 'entry status' will be visible for each entry. The status will indicate whether you need to take any action to help us process your entries successfully.

Entry submission history (search results – entry spreadsheets)



Descriptions of each of the status messages (including any action required) are given in the table at the bottom of the page and are reproduced below:

Status	Description	Action required?
Duplicate file	The spreadsheet could not be processed as it contains duplicate entries	Please call the OCR Customer Contact Centre to resolve this issue
Empty file	The spreadsheet does not contain any details	Please check and upload the spreadsheet again
OCR handling this	We are currently resolving the outstanding issues with the spreadsheet	None required
Processing complete	The spreadsheet has been successfully uploaded and processed	None required
Processing in progress	We are currently resolving any issues with the spreadsheet	None required
Read and recognised	The spreadsheet has been successfully uploaded and is currently being processed	None required
Read and rejected	The spreadsheet is incorrectly formatted or there was a problem processing the file	Please call the OCR Customer Contact Centre to resolve this issue
Upload failed	The spreadsheet could not be uploaded	Please check and upload the spreadsheet again

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## Further support

**OCR Customer Contact Centre**

02476 851509

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