

Education & Skills Funding Agency

**Provider Data Self-Assessment Toolkit
(PDSAT)**

User Guide





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Introduction

The Provider Data Self-Assessment Toolkit (PDSAT) is a tool for further education and training providers (colleges, training providers and employers) to output a series of reports to test the integrity of their Individualised Learner Record (ILR) data. This will assist providers in carrying out their routine data cleansing and submitting accurate ILR data returns to the Education & Skills Funding Agency (ESFA).

PDSAT is now an online tool accessed from <https://www.pdsat.co.uk/>, and is regularly updated to incorporate the latest LARS data and changes per the specification from the ESFA. This PDSAT platform is replacing the existing installable application and provides similar functionality.

The current release of PDSAT includes:

- Release of PDSAT Online, including functionality around organisation and user management
- Importing of ILR and FIS returns for the current (2022 to 2023) and prior (2021 to 2022) funding years
- PDSAT reports for current and prior funding years
- Dashboard view of reports, enabling viewing and exploration of return data within the app
- New reports added:
 - 23A-109: All Skills Bootcamp learners and learning aims
 - 23A-110: All community learning learners and learning aims
 - 23A-216: Actual off-the-job training hours

Providers are responsible for implementing adequate and effective controls surrounding the submission of funding claim(s) to the Education & Skills Funding Agency. The Provider DSAT reports are a suite of exception reports highlighting potential data anomalies in certain areas which may require further investigation.

Provider DSAT reports should not be solely relied upon to identify all irregularities that may exist. Providers are also reminded that the Agency's contractual requirements include significant other areas not covered by Provider DSAT reports.




1. Registering a new Organisation

To register a new organisation, a user who has not yet registered to PDSAT Online must request the creation of one using the "Register Organisation" button from the landing page.



The following box will appear. The user is required to accept the terms presented on the screen before proceeding any further.



PDSAT

Providers are responsible for implementing adequate and effective controls surrounding the submission of funding claim(s) to the Education & Skills Funding Agency. The Provider DSAT reports are a suite of exception reports highlighting potential data anomalies in certain areas which may require further investigation.

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Acceptance of the terms by clicking 'Accept' is a one-time acceptance for the organisation.



Once clicking on "Accept", the below screen will appear. The user must enter the required information:

- Email Address
- Organisation Name
- Organisation UKPRN

It is important to check the accuracy of the information entered, to avoid issues or delays with the approval and set-up of the organisation.


The screenshot shows the 'Register New Organisation' form. At the top is a blue header with the PDSAT logo and text. The form title is 'Register New Organisation'. It contains two columns of input fields: 'Email Address *' and 'Confirm Email Address *' in the top row, and 'Organisation Name *' and 'UKPRN *' in the bottom row. Below the fields are 'Submit' and 'Cancel' buttons. A 'Login' button is present with the text 'Already signed up? Please'. At the bottom, there is a link: 'Facing an issue? Please contact the PDSAT helpdesk.'

Once the user enters all the relevant details, they should be met with the following screen:

The screenshot shows a confirmation screen with a blue header containing the PDSAT logo and text. The main content area has a white background with the following text: 'Thank You for Registering your Organisation!', 'You will receive an email in the next 2 days, confirming the submitted. If this is not received please resubmit your application.', and a 'Return to Site' button at the bottom.



When the request is approved or rejected by the ESFA, the user will receive an email confirming this. If the email does not arrive to your inbox, please make sure to search your spam folder and allow list the email address noreply@pdsat.co.uk



PDSAT


Thank you for registering an organisation. This request has now been approved.

Organisation name

You'll soon receive an email inviting you to create an account to join the organisation.

PDSAT Online

A follow-up email will arrive asking the user to accept the invitation to join the previously requested organisation, as below:



PDSAT

You've been invited to access the following organisation within PDSAT Online:

Organisation name

by

User name

[Accept](#)

If you accept this invitation, you'll be sent to <https://pdsat.co.uk>

PDSAT Online


Clicking "Accept" will take the user to the PDSAT website to register an account.



2. Registering a new User Account

When a user registers an organisation or is invited by the organisation owner of an existing organisation, they will receive an email asking them to accept the invitation to join. Clicking on "Accept" on the email will take the users to the following screen:

< Cancel



User Details

Send verification code

Create



To complete registration as a new user, follow these instructions:

- Enter your Email Address – this should match the address the user received the invitation to
- Click on “send verification code”
- An email with a verification code will be sent to the user’s email address, and the following dialog box will appear:

Verification code has been sent to your inbox. Please copy it to the input box below.

- Enter the code that was sent to your email address in the “Verification Code” box
- Press “Verify code”. The email address will now be verified and the user can continue filling in the rest of the form.
- Enter a new password (requires a combination of lower and upper-case characters, digits, and a special character)
- Complete the rest of the form, including choosing a ‘Display Name’, which will be the username of the account
- Click Create

Please note that clicking ‘Create’ before completing the email verification will not move on to the next step, and may clear the form requiring you to re-enter your details.



2.1 Set up Multi-Factor Authentication

To access PDSAT Online the user will need to link their account to a phone number to sign-in. To do so, the user must select a country code (select UK from the drop-down list), and then enter a phone number to which the access codes will be texted to. There is an option to be called to authenticate instead of receiving a text, for those users who would prefer that method.

The image displays two sequential screenshots of the 'Multi-factor authentication' setup process. Both screens feature the agency's logo at the top center and a '< Cancel' link in the top left corner.

The first screenshot shows the initial form. Below the logo, the text reads: 'Enter a number below that we can send a code via SMS or phone to authenticate you.' There are two main input sections: 'Country Code' with a dropdown menu currently showing 'United States (+1)', and 'Phone Number' with a text input field containing the placeholder 'Phone number'. At the bottom, there are two blue buttons: 'Send Code' and 'Call Me'.

The second screenshot shows the verification step. The text reads: 'Enter a number below that we can send a code via SMS or phone to authenticate you.' Above the verification code input field, the country code '+447' and the phone number '5' are displayed. The input field contains a vertical cursor. Below the input field is a blue button labeled 'Verify Code'.

Once the user enters the code to verify (or follow the instructions from the automated phone call) the set-up will be complete, and the user will be able to log-on to PDSAT Online.




3. Logging in to PDSAT with an existing account

3.1 Logging in to PDSAT

To log on to PDSAT Online, navigate to <https://pdsat.co.uk/> in an internet browser, then click on the "Login" button on the top right hand corner of the screen.

This will bring up the following screen to enter the email address and password that was set-up during the registration process and sign in.


Sign in
Sign in with your email address

Email Address

Password

[Forgot your password?](#)

Sign in

3.2 Re-setting a password

If the user has forgotten their password, they have the option to reset it from the sign-in screen.



3.3 MFA Authentication

< Cancel



Multi-factor authentication

We have the following number on record for you. We can send a code via SMS or phone to authenticate you.

XXX-XXX-XXXX5

Send Code

Call Me

If the user has entered the correct information on the sign-in screen, they will be asked to authenticate using the phone number that was provided during the Set Up Multi Factor Authentication step.

Send Code

Choosing the option “Send Code” will result in the user receiving a text message with the code to enter on the next screen.

Call Me

The option “Call Me” will result in the user receiving an automated phone call in which a recording will prompt the user to “Press the pound key” – the user can then press # on their phone to authenticate the log-in.



4. User Types and Permissions

PDSAT Online has three types of users.

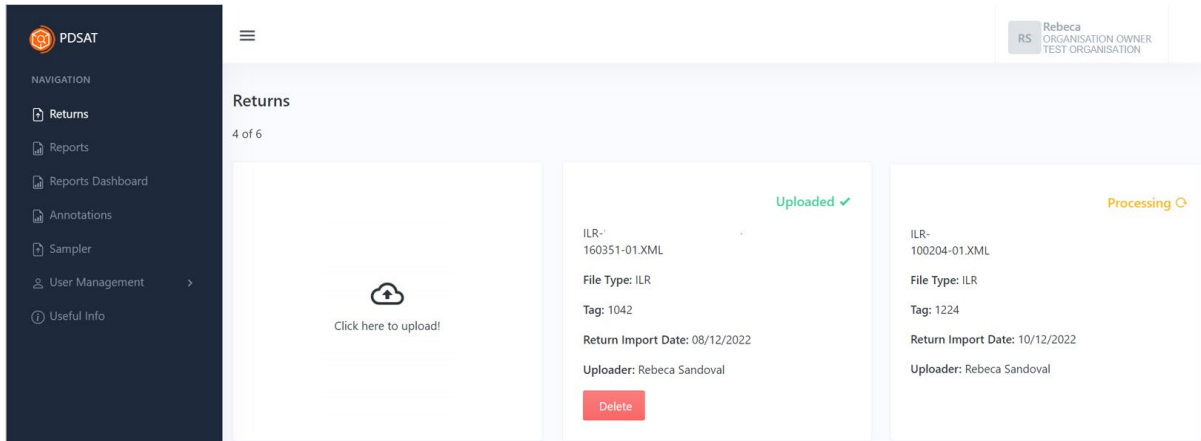
- **Organisation Owner:** Users within an organisation are managed by the organisation owner. The organisation owner can add/edit/delete users within the organisation (including changing the role assigned to each user). Each organisation must have between one and three organisation owners. Organisation owners have the same access in relation to upload, view and download as the Uploader role.
- **Uploader:** An uploader will be able to run and view all reports and dashboards, upload ILR and FIS files, delete reports, and add annotations. There can be multiple uploaders within an organisation.
- **Reviewer:** A reviewer will be able to navigate through the platform and view all reports and dashboards. They are able to export reports and upload annotations. They cannot upload ILR or FIS data, or delete reports. This role is intended to function as a “read-only” type of user. There can be multiple reviewers within an organisation.



5. Returns

When the user logs on to PDSAT Online they will land on the Returns tab. The user can also navigate to this tab using the side bar on the left-hand side of the screen.

This section gives the users with appropriate permission (please see section User Types and Permissions) the ability to import ILR XML files and import zip FIS files into PDSAT.



The returns tab shows any returns that have been loaded to the organisation.

Key Return Data

Every return loaded contains metadata to identify the return, file type, tag (optionally entered by the user during the upload process), return import date, and uploader. It also shows the return status (Processing, Uploaded, or Failed)

Return count and limit

The returns tab also indicates how many returns the organisation is able to load, and how many returns have been loaded. The screenshot above shows 4 out of 6 available returns have been loaded in the organisation. Once the limit is reached, users will need to delete returns before being able to load another return.



5.1 Uploading a Return

To upload a return, the user can click on the “Click here to upload” button. They will be met with the following screen:

- Select the Return Type (FIS or ILR) from the drop-down
- A tag can optionally be entered to help the user identify the return once it's been loaded. This tag information will also be present in the report that will automatically be created once the return is successfully loaded.
- The Choose File button will open a window for the user to browse to the location of their files. Depending on the type of file they have selected in the Return Type, the user will be able to load

Note: there will be a waiting period between selecting a return, and the return appearing in the textbox next to the “Choose File” button. The app may appear to hang, but will proceed to show the return name after a short pause.

Once the return appears on the text box, the user can click on “Submit”. This process will take a few moments to commence before the user will be taken back to the returns screen, where the upload will show be shown with the status “Processing”.

5.2 Failed return uploads

If a return fails to process at any stage, for example if an ILR does not meet the ILR schema specification, the return will show the status “Failed”.

5.3 Deleting a Return

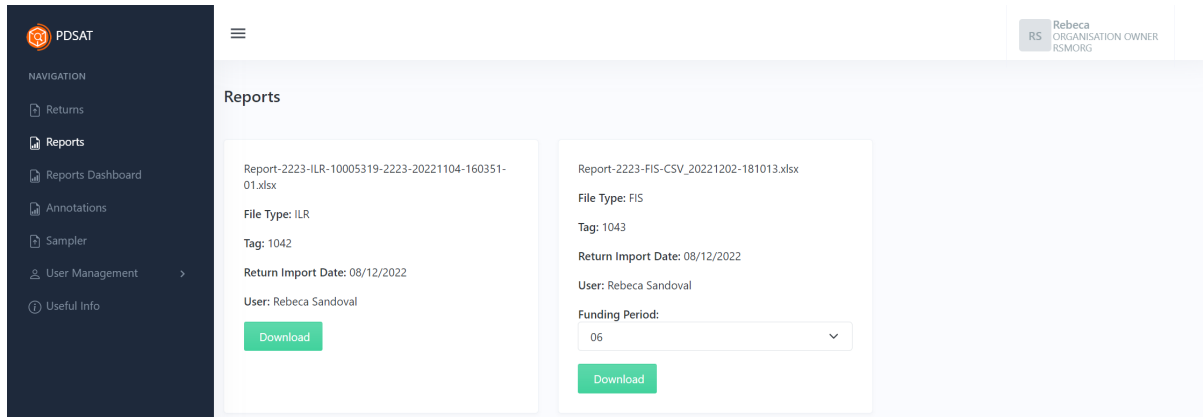
Once a return is loaded, the delete button will become enabled.

Note: Deleting a return will delete all associated data from the reports tab, and the reports dashboard.



6. Reports

To navigate to the reports tab, select the button titled "Reports" in the side bar. The page you will see will look like this:



Every loaded return will have an associated report, which is created automatically on upload.

Key report data

The return metadata will be present for its corresponding returns, including any optional tags the user has entered to facilitate the identification of the return/report.

Download button

This will allow the user to download the Excel reports to the user's local drive.

6.1 Re-running a FIS report for a different funding period

A user can re-run an existing FIS report for a different funding period, by selecting a new Funding Period from the drop-down. This will change the "download" button to a "Re-Run" button.

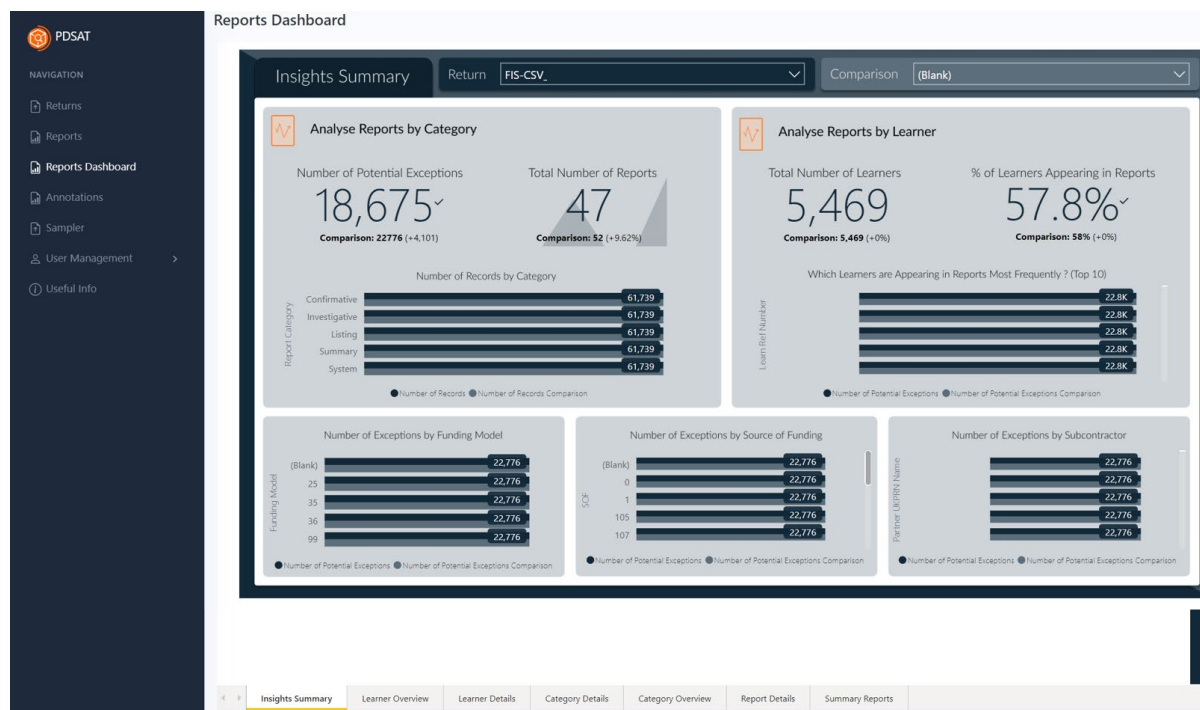
Whilst this process is running, the report will have a status of "Processing" until the new report is ready for downloading.

Note: re-running a FIS report for a different funding period will replace the previous report.



7. Reports Dashboard

To navigate to the dashboard, select the button titled “Reports Dashboard” in the side bar. The page you see will look like the below: (please note the screenshot below has been anonymised and the figures shown will vary depending on the return the user is inspecting at the time).



Return selection

The user can select a previously loaded return from the drop-down on the top of the screen.

This will update the data in all the graphs.

Navigation

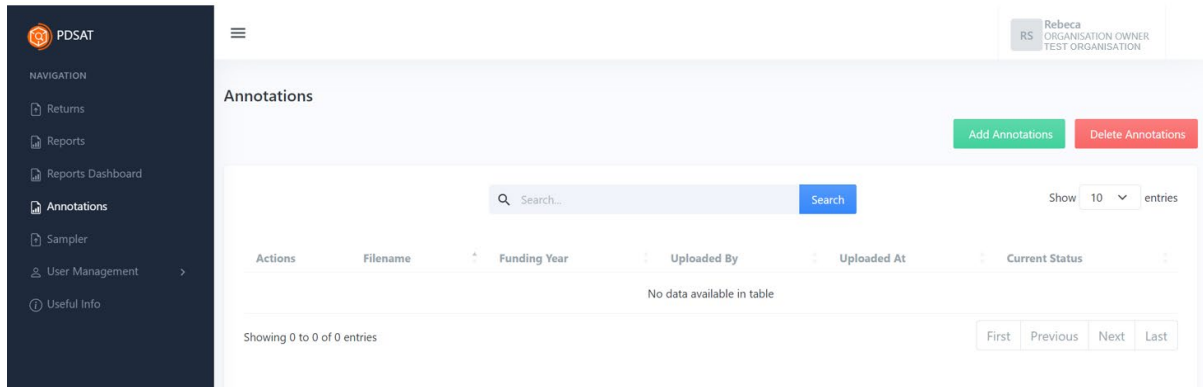
The user can scroll-down the page and select on the different tabs to navigate through the dashboard:

- Insights summary: high-level information of the selected return, including an analysis of reports by category and reports by learner.
- Category overview: overview of records that appear in reports by report category, between listing, confirmative, and investigative reports. Note: Listing reports are not categorised as exceptions.
- Category detail: further information about reports by categories, including number of records by learning aim, source of funding, subcontractor, and a reports and learner detail view.
- Learner overview: record counts of learning aims, total learners, number of learners by aim type or learning aim, and potential exceptions by delivery location.
- Learner details: view of learner by aims by category, records by category, reports the learner appears in, and learning aims linked to the learner.
- Report details: table view of details for each individual report.
- Summary reports: overview of reports of the “summary” type.



8. Annotations

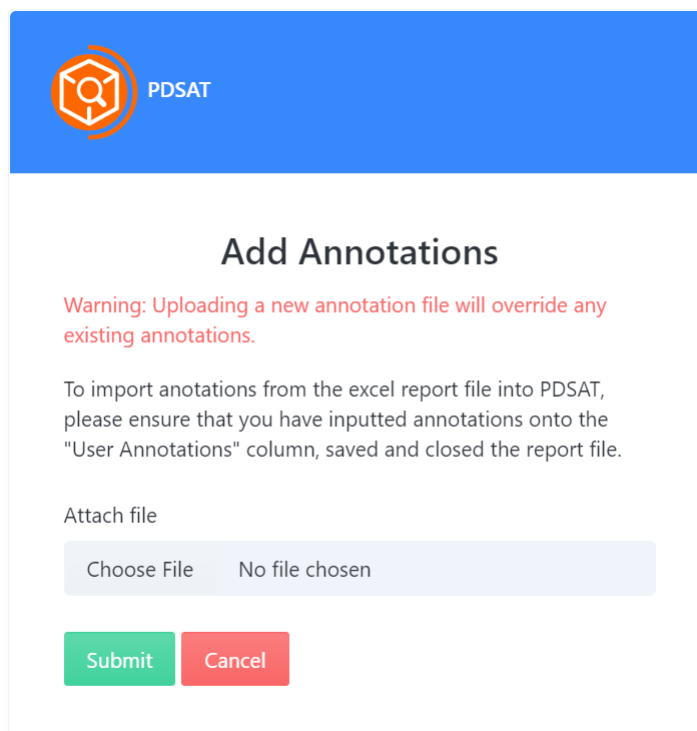
To navigate to the annotations tab, select the button titled “Annotations” in the side bar. The page you see will look like this:



8.1 Importing Annotations

This section provides some brief instructions on how to import your annotations from an Excel report you have added annotations to. The detailed steps are below:

- Add annotations to the reports using the “User annotations” column. The import process is not affected by the change of colour or font of the cells within the worksheet, however altering the main header section of the report will impact the import process and should therefore be avoided.
- Ensure that you have saved and completely closed the report you are going to import.
- Select the “Add Annotations” button and this will open a window which allows you to select the file you wish to import annotations from, as seen below:



- Select the saved report which contains the annotations.



- Click "Submit"
- The successfully uploaded annotations will appear in the table on the Annotations tab

Note: After uploading annotations, the user needs to re-upload all relevant returns (or re-run a report from a FIS file by changing the funding period) for the reports to be generated again containing the relevant annotations.

8.2 Deleting Annotations

By selecting the "Delete Annotations" buttons the user will be able to delete annotations added to PDSAT

The screenshot displays the PDSAT Sampler interface. On the left is a dark navigation sidebar with the PDSAT logo and menu items: Returns, Reports, Reports Dashboard, Annotations, Sampler, User Management, and Useful Info. The main content area is titled 'Sampler' and features two dropdown menus for 'Select FIS Return' and 'Funding Period', a 'Filters' button, and a green 'Run' button. A large white box in the center contains the message: 'Please select a FIS return to use the sampler'. Below this is a search bar with a magnifying glass icon and a 'Search' button. To the right of the search bar is a 'Show 10 entries' dropdown. Below the search bar is a table header with columns: Actions, Filename, Uploaded By, Uploaded At, Current Status, and Download Link. The table body is empty, showing 'No data available in table' and 'Showing 0 to 0 of 0 entries'. At the bottom right of the table area are navigation buttons: First, Previous, Next, and Last.



9. User Management

This section is only available for users with the "Organisation Owner" permissions.

To navigate to this page, select the button titled "User Management" and then "Users" in the side bar. The page you will see will look like this.

Actions	First Name	Last Name	Email	Role	Organisation	Signup Cc
	Jane	Doe	Jane.Doe@gmail.com	Uploader	Provider [56785678]	

Invite New User

To invite a new user, an organisation owner can click on the "Invite New User" button. This will open the following screen:

Invite User

First Name *

Last Name *

Email Address *

Confirm Email Address *

User Role *

Organisation Owner



The organisation owner must fill in the details of the user they wish to invite to their organisation. Please refer to the section “User types and permissions” for details of the different user roles that can be set for new users.

Clicking “Submit” will send an invite to the users to the email that has been specified in the form. Please make sure to inform your users to check their email for this invitation. Some organisations might flag the emails as spam, so do make sure to check this folder for the email invitation.

Actions

The organisation owner can edit the permissions of all existing users of the organisation using the “Edit Record” button.

The organisation owner can also remove users from the organisation using the Delete Record button. This will remove access to the user in question and deactivate their account.

Signup Complete

This section allows the organisation owner to identify which users have completed their registration successfully. Users who have accepted the invitation, created an account, and set up MFA will appear with a tick mark.

9.1 User Limits

There are limits for how many users an organisation can invite. Providers are able to have a total of 6 users in their organisation.



10. PDSAT Support

PDSAT provides a link in the bottom left-hand corner of the side bar which is titled "Contact the Helpdesk".

Alternatively, please email DSATHelpDesk@kpmg.co.uk for all PDSAT enquiries. Include the following information:

- Your organisation's name
- The version of PDSAT you are using (found at the bottom of the screen)
- A description of your problem, including any helpful screenshots.

The PDSAT Helpdesk will aim to respond to your query within two working days.



11. Future updates

A future release is planned for early 2023 to introduce cross-return reports and sample generation to online PDSAT, in line with the equivalent functionality in the superseded desktop application.

11.1 Limitations and known issues

Online PDSAT only allows upload of returns from the 2021 to 2022 funding year onward. Historic funding years are not planned to be added to online PDSAT.

The current issues are currently present in PDSAT and will be addressed in future releases:

- Uploading annotations will not generate new versions of existing reports in PDSAT, however the annotations will appear in reports generated in subsequent uploads.