

# **New Courses and Course Differences Bulk Uploading Process**

## **Under SDR**

**Version 1.3**

Ministry of Education  
45-47 Pipitea Street,  
Thorndon  
P O Box 1666  
Wellington

**Last updated: Tuesday, 28 January 2014**

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## Logging into the STEO Secure site

### Logging in using your User ID and Password

To log on using a User ID and Password, go to <https://steo.education.govt.nz/secure/login.aspx> and you will come to to the **Secure Site**:

This screen contains important and general information regarding the current SDR Round and the STEO website. If there are any important messages the Ministry of Education or TEC need to communicate out to TEOs, these will be posted on this page.

Messages that are posted in **GREEN** indicate that previous issues have been resolved.

Messages posted in **RED** indicate issues that have been raised and are awaiting a resolution.

All general information will be posted in **BLACK**.

If you have forgotten your password, click here to be taken to your challenge phrases

To continue to login, click **Log In**

Next you will be brought to the Education Sector Authorisation and Authentication (ESAA) Login page.

## Education Sector Logon

User ID

Password

[Education Sector Logon and Access Form](#)  
[Education Sector Authorisation Form](#)  
[Forgotten your password?](#)  
[Logon with a digital certificate](#)  
[Software/Hardware Settings](#)

If you are having difficulty logging in, please call the Sector Service Desk on 0800 422 599 or email [sector.servicedesk@minedu.govt.nz](mailto:sector.servicedesk@minedu.govt.nz)

[About ESAA](#) | [Help?](#) | [Privacy](#) | [Conditions of Use](#)

Enter your **User ID** here

Enter your **Password** here

Click **Logon** to login and begin your validation process

## SDR Validation

When you have successfully logged into the **Secure Site** you will see the screen below.

Like the **Log In** screen, this page contains the same important and general information regarding the current SDR Round and the STEO website. If there are any important messages the Ministry of Education or TEC need to communicate out to TEOs, these will be posted on this page.

Messages that are posted in **GREEN** indicate that previous issues have been resolved.

Messages posted in **RED** indicate issues that have been raised and are awaiting a resolution.

All general information will be posted in **BLACK**.

The screenshot shows the top navigation bar of the 'Services for Tertiary Education Organisations' website. The bar includes the Ministry of Education logo, the title 'Services for Tertiary Education Organisations', and a user profile section with 'Name (XXXX)' and 'Organisation name (XXXX)'. Below the bar is a secondary navigation menu with 'Secure Site', 'Change Organisation', 'TEC', 'Log Out', 'Help', 'NSI', and 'IDocs'. A main navigation bar contains 'SDR', 'Completions', 'Provider', 'E-Learning', 'TDQ Return', and 'Communications'. The main content area features a 'Welcome Name (XXXX)' message and a box containing three sections: 'Messages in GREEN' with the text '<All messages that are posted in green indicate that previous issues have been resolved>', 'Messages in RED' with '<All messages that are posted in red indicate that issues have been raised and are awaiting a resolution>', and 'Messages in BLACK' with '<All general information will be posted in black>'. Lines connect these sections to the text in the preceding paragraphs. A line also points from the 'SDR' link in the navigation bar to the text 'Click on SDR to begin validating your SDR'.

Click on **SDR** to begin validating your SDR

Once you have clicked on **SDR**, you will see the screen below:

The screenshot shows the 'SDR Validation' page. The top navigation bar is identical to the previous screenshot. The secondary navigation bar now includes 'Change Context', 'TEC', 'Log Out', 'Help', and 'NSI'. The main navigation bar includes 'SDR Validation' and 'Workforce Questionnaires'. The main content area features a 'SDR Validation' link in the left sidebar and a large text block explaining the SDR process. The text states: 'The Single Data Return (SDR) comprises four computer files that are generated by tertiary information providers' student enrolment system, then validated through a validation program provided by the Ministry before being electronically submitted to the Ministry three times a year. One additional file (the forecast file) is generated by the user within the validation program. From 2008 a new funding mechanism will be progressively introduced incorporating a Student Achievement Component, a TEO component, and the development of an Investment Plan. For TEO's not on a plan for 2008, the TEC's Tertiary Funding System (TFS) uses the validated SDR files to calculate EFTS funding for student enrolments in courses leading to approved qualifications, and to calculate forecast enrolments for future payments, and to create wash-up payments for actual versus forecast data. The return also provides the base data for compilation, analysis, and reporting of tertiary education statistics on student enrolments, course and qualification completions. For the TEO's on a plan for 2008, they must continue to return an SDR and complete the EFTS forecast as this is required for the collection of statistical base data described previously.' A line connects the 'SDR Validation' link in the sidebar to the text 'Click the SDR Validation link to begin SDR Validation'.

Click the **SDR Validation** link to begin SDR Validation

MINISTRY OF EDUCATION  
7373 Kafa-hi-ki-Akama-enge

# Services for Tertiary Education Organisations

Secure Site Change Context TEC Log Out Help NSI

SDR Completions Provider E-Learning Communications

SDR Validation Workforce Questionnaires

SDR Validation Summary

Return Month  Show Validate New SDR

Click on **Validate New SDR** to begin the SDR Validation Process

## Course Register (CREG) File Validation Steps

There are five steps for validating your CREG file in SDR Validation.

### STEP 1: SDR Validation - Select SDR File Type

Select **Course Register**

Select appropriate **Return Year**. When selecting the **Return Year**, make sure you select the correct year as this will affect the fields that will become available to you on Step 2 of the validation process

The screenshot shows the 'SDR Validation' interface. At the top, there is a navigation menu with options like 'SDR', 'Completions', 'Provider', 'E-Learning', 'TDO Return', and 'Communications'. Below the menu, the 'SDR Validation' section is active. The main content area is titled 'SDR Validation' and contains the following elements:

- File Type:** Radio buttons for 'SDR Full', 'Course Register', 'Course Completion', and 'Qualification Completion'. An arrow points to the 'Course Register' option.
- Return Year:** A dropdown menu. An arrow points to this field.
- Email Notification Contacts:** Checkboxes for 'Contact 1 \*', 'Contact 2 \*', and 'Contact 3'. An arrow points to this section with the text 'Check Email Notification Contacts box to specify who receives email'.
- \* Data Returns contacts:** A red 'Next' button. An arrow points to this button with the text 'Click the Next button'.

Click the **Next** button

## **STEP 2: SDR Validation - Upload CREG File**

Locate the **CREG** data file from your Student Management System (SMS) by clicking the **Browse** button on the right hand side

Alternatively locate the **Single Zip File** if your file is zipped

Click the **Next** button to continue, or the **Previous** button to go back

The screenshot shows the 'Services for Tertiary Education Organisations' website. The navigation bar includes 'Secure Site', 'Change Context', 'TEC', 'Log Out', 'Help', and 'NSI'. The main menu has 'SDR', 'Completions', 'Provider', 'E-Learning', and 'Communications'. The sub-menu shows 'SDR Validation' and 'Workforce Questionnaires'. The page title is 'SDR Validation'. On the left, it says 'Step 2 of 5: Upload SDR Files' and provides instructions: 'If you are uploading a single zip file for validation, please ensure the files contained in the zip file are named correctly, for example COURXXXX for the enrolment file, CREGXXXX for the course register file, STUDXXXX for the student file, COMPXXXX for the course completion file and QUALXXXX for the qualification completion file. Where XXXX is your provider code. The name of the zip file itself can be anything you choose, for example MySDRFiles.zip'. The main form area has two sections: 'Course Register File' with a text input and a 'Browse...' button, and 'Single Zip File' with a text input and a 'Browse...' button. At the bottom of the form are three buttons: 'Reset', 'Previous', and 'Next'. Arrows from the text above point to the 'Browse...' buttons and the 'Next' button.

## **STEP 3: SDR Validation - Select SDR Return Month**

Select appropriate **Return Month** and year

Click the **Next** button to continue or the **Previous** button to go back

The screenshot shows the 'Services for Tertiary Education Organisations' website. The navigation bar includes 'Secure Site', 'Change Context', 'TEC', 'Log Out', 'Help', and 'NSI'. The main menu has 'SDR', 'Completions', 'Provider', 'E-Learning', and 'Communications'. The sub-menu shows 'SDR Validation' and 'Workforce Questionnaires'. The page title is 'SDR Validation'. On the left, it says 'Step 3 of 5: Select SDR Return Month'. The main form area has a 'Return Month:' label followed by a dropdown menu. Below the dropdown are two buttons: 'Previous' and 'Next'. Arrows from the text above point to the dropdown menu and the 'Next' button.



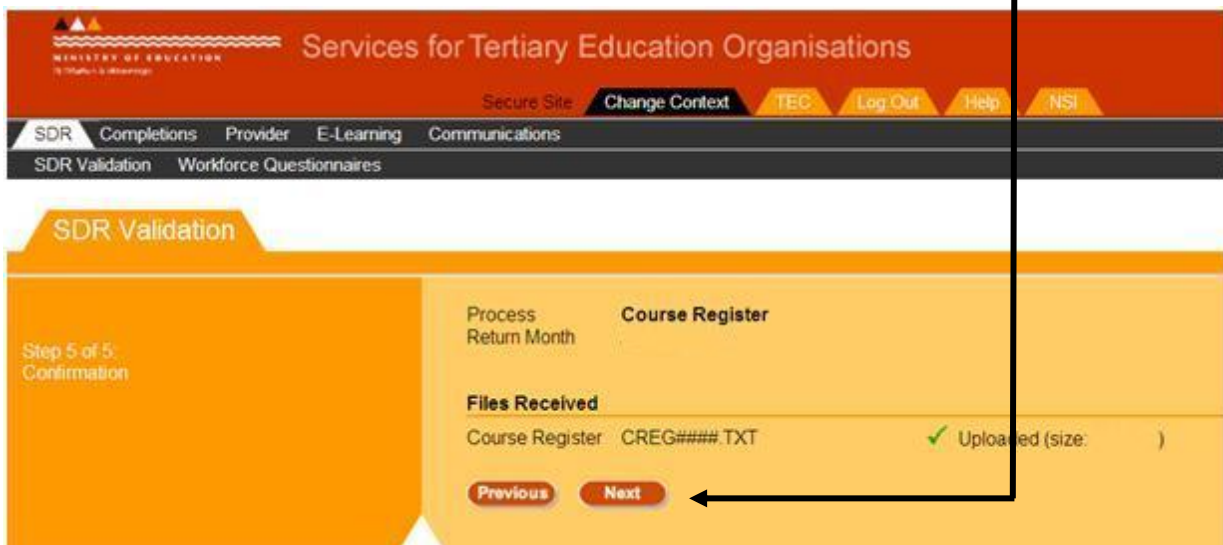
### **STEP 4: SDR Validation - Enter Notional EFTS**

This step has been **removed** for all but historical returns i.e. Returns that are prior to 2006

### **STEP 5 :SDR Validation - Confirmation**

This screen confirms that the CREG file have been uploaded to the Ministry SDR server ready to be validated

Click **Next** to proceed or the **Previous** button to go back



## Validation Queue

You will now enter the SDR validation queue. If you chose to receive email notification at step 1 of the validation process, you will receive an automated email to inform you of this. The email will let you know where you are in the processing queue e.g. 1 of 1.

SDR Validation Summary									
(1 Result Found) Showing 1-1 Page 1 of 1									
Date Received	SDR Type	Status	Validation Rules	Process Time	File Counts	EFTS	Downloads	Reports	Other
	CREG	Q 1 of 1 in queue	Errors: 0 Warnings: 0		Courses: 0	0			
(1 Result Found) Showing 1-1 Page 1 of 1									

Refresh the screen after **PROCESSING** until the status changes to **"In Progress"**

SDR Validation Summary									
(1 Result Found) Showing 1-1 Page 1 of 1									
Date Received	SDR Type	Status	Validation Rules	Process Time	File Counts	EFTS	Downloads	Reports	Other
	CREG	In Progress	Errors: 0 Warnings: 0		Students: 0 Courses: 0 Enrollments: 0 Course Comp: 0	0			
(1 Result Found) Showing 1-1 Page 1 of 1									

Once your CREG file moves from the queue and begins processing you will receive a second email. This email will advise you that the Ministry of Education has received your file and that it has started processing. The email will also include the date and the time that the file was received.

SDR Validation Summary									
(1 Result Found) Showing 1-1 Page 1 of 1									
Date Received	SDR Type	Status	Validation Rules	Process Time	File Counts	EFTS	Downloads	Reports	Other
	CREG	✘ Rejected	Errors: 11 Warnings: 22	20s	Courses: 11	0		<a href="#">Error Report</a>	
(1 Result Found) Showing 1-1 Page 1 of 1									

When your CREG file has finished processing, it will either return rejected (has errors) or processed. You will receive a final email advising you that your file has now completed the processing stage.

## Errors and Warnings

You can access detailed information about the errors and warnings by clicking on the **Error Report** link (in red).

SDR Validation Summary									
(1 Result Found) Showing 1-1 Page 1 of 1									
Date Received	SDR Type	Status	Validation Rules	Process Time	File Counts	EFTS	Downloads	Reports	Other
	CREG	✘ Rejected	Errors: 11 Warnings: 22	20s	Courses: 11	0		<a href="#">Error Report</a>	
(1 Result Found) Showing 1-1 Page 1 of 1									

Once you have clicked the Error Report link, you be taken to the following page:

SDR Validation Errors			
<input checked="" type="checkbox"/> Creg		<a href="#">Show</a>	<a href="#">View All Errors</a> <a href="#">View All Warnings</a>
Code	Type	Count	Description
10	E	<a href="#">11</a>	<a href="#">Qualification Code is not listed on Qualification Register</a>
376	W	<a href="#">11</a>	<a href="#">CC COSTS = 0</a>
384	W	<a href="#">11</a>	<a href="#">There is no benchmark fee for the course</a>

[Close](#)

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**Code:** Gives you the code of the error or warning.

**Type:** 'E' means it is an error and must be resolved, 'W' means it is a warning.

**Count:** Number of records the error/warning affects.

**Description:** Gives a description of the error/warning.

On this screen you will see all the errors and warnings that have been generated from your CREG file. To view details of a particular error, click on the **Description** of the error or the **Count**.

Once you have processed an error free file, this concludes the first stage of your SDR Validation. You now need to look at your **Course Register Difference**.

SDR Validation Summary									
(15 Results Found) Showing 1-15 Page 1 of 1									
Date Received	SDR Type	Status	Validation Rules	Process Time	File Counts	EFTS	Downloads	Reports	Other
	CREG	✔ Processed	Errors: 0 Warnings: 3	7s	Courses: 1	0		<a href="#">Error Report</a>	<a href="#">Course Diff Submit (1)</a>

## Course Register Differences

Course Register Differences are split into two areas, **Auto Approved values** and **Manually Approved values**.

**Auto Approved values** – these are the differences between the information the TEC hold on your course and the information you have supplied in your validation files. They are changes that TEC do not need to verify, and will automatically update the TEC course register when submitted. Verify the change is required and tick the **Submit (green) box**.

Status	Course Code	Title	Qual Code	Cpt	Class	Factor	NZSCED	Fee	CCCost	Credit	Register Level	Foreign Fee	Stage	PRF Flag
TEC Course Register	22280M	Dive master	PC2228	AT	3.0	0.9887	092103	\$1,304.0	\$0.0	20	3	NULL	2	X
TEC Course Register	22281PEC	Specialist	PC2228	AT	3.0	0.1250	092103	\$1,304.0	\$0.0	15	3	NULL	2	X

Please note that the first line “**TEC Course Register**” is the information that the Tertiary Education Commission hold on their course register. **And for New Courses the first line will have no data.**

The second line is the information you have supplied which is new or different to the “**TEC Course Register**”.

**Manually Approved values** – changes need to be approved by the TEC Service Centre and for TEIs by your National Office TEC Advisor.

Select the **Manually Approved values** options, if you wish to keep the values, as opposed to changing it on your SMS. Select the **Submit (red) box** if you wish to do this. This request will be raised with TEC.

You can now filter to select and submit auto-approved changes in one hit. You can then submit manual approval changes to TEC separately. To do this select check the **Auto-Approved** box and then click the **Show** button.

If you wish to submit all of the changes, rather than ticking each box individually you can tick the **Select All** button.

**If TEC want the TEO to change their SMS values, then once these changes have been made on the SMS the TEO must re-extract their SDR files and re-validate.**

Note that you will not be able to submit your SDR until all New Courses and/or Course Differences have been resolved (approved).