

## Bulk Offering Upload – Instructions for Educational Institutions

The Student Management Information System (SIMS) allows for Study Period Offerings to be uploaded ‘in bulk’ into the system. StudentAid BC (SABC) has created an Excel template which can be used by institutions to capture all relevant Study Period Offering information that is required to submit an Offering into the system. See instructions below for how to complete and upload the Excel template.

**Note:** Once submitted, Study Period Offerings **cannot** be deleted. Please ensure you review the information carefully before submitting.

### Completing the Bulk Offering Upload Excel Template:

1. Every field in this template is required, as it mimics the fields available on the SIMS interface when manually submitting one Offering at a time.
2. The excel contains data validations that match those in the SIMS interface. **Do not** edit the data validations, or the upload will not work.
3. The excel is formatted to align with system validations performed upon upload. **Do not** edit formatting anywhere in the excel file.
4. When finished completing the excel according to the attributes below, delete the example rows from the excel file (rows 2 & 3).

Attribute	Description / Instructions	Example Input
<b>Institution Location Code</b>	Format must be 4 uppercase letters	AAAA
<b>SABC Program Code</b>	An SABC program code is required for Bulk Offering Upload. (It is optional if you wish to enter Offerings manually).  <b>*Note:</b> The program itself must also have the same SABC program code.	ABC9
<b>Name</b>	This is the name of the Study Period Offering. The final name displayed to students will include the text in this field, plus the year of study (if applicable). In this field, you can add such details as: program year, semester identification, cohort identification, term identification. Campus location	B. Eng. Fall Semester with co-op

Attribute	Description / Instructions	Example Input
	<p>can also be added to the Offering name if necessary.</p> <p>The study dates will also be viewable to the student when selecting offerings.</p>	
<b>Year of Study</b>	The year of study is the year of the program the student is participating in.	1
<b>Show Year of Study</b>	<p>Choose whether the year of study will be displayed to students in the Offering name.</p> <p>Note: This option is defaulted to "Yes"</p>	yes
<b>Offering Intensity</b>	<p>Indicate whether this Offering will be Full-time or Part-time</p> <p>In order to input a PT study period offering, PT must be indicated at the Program level</p>	Part Time
<b>Course Load</b>	<p>Indicate the course load intensity (as %) of this Offering.</p> <p>This is a free-text field, applicable only to PT Offerings.</p> <p>If FT offering, leave this field blank.</p>	25
<b>Delivered Type</b>	<p>Indicate how this Offering will be delivered.</p> <p>In order to input an online or blended Offering, the same has to be indicated at the Program level.</p>	online
<b>WIL Component</b>	<p>Does the Offering contain a Work-Integrated Learning component?</p> <p>In order to input an Offering with a WIL component, WIL must also be indicated at the Program level.</p>	yes
<b>WIL Component Type</b>	This is a free-text field to input WIL type	Co-op

Attribute	Description / Instructions	Example Input
<b>Start Date</b>		2021-09-07
<b>End Date</b>	The end date must be either the last day of classes, or the end of exam period - whichever is later	2021-12-20
<b>Has Study Breaks</b>	For a full list of policy rules and technical validations regarding study breaks, please refer to the information materials circulated to ASAP in October 2022.	no
<b>Study Break 1 - Start Date</b>		
<b>Study Break 1 - End Date</b>		
<b>Study Break 2 - Start Date</b>		
<b>Study Break 2 - End Date</b>		
<b>Study Break 3 - Start Date</b>		
<b>Study Break 3 - End Date</b>		
<b>Study Break 4 - Start Date</b>		
<b>Study Break 4 - End Date</b>		
<b>Study Break 5 - Start Date</b>		
<b>Study Break 5 - End Date</b>		
<b>Actual Tuition</b>	Free-text field. Indicate the dollar amount.	12
<b>Program Related Costs</b>	Free-text field. Indicate dollar amount.  Please leave this field blank if there are not costs for this field	424
<b>Mandatory Fees</b>	Please leave this field blank if there are not costs for this field	500
<b>Exceptional Expenses</b>	Free-text field. Indicate dollar amount.  Please leave this field blank if there are not costs for this field	121
<b>Public Offering</b>	Indicate whether or not this is a publicly viewable Offering.  Offerings can be made viewable to all students or can be created as a 'private' offering. A private offering is viewable only by institution users to respond to the Program Information Request (PIR) process	no

Attribute	Description / Instructions	Example Input
<b>Consent</b>	Indicate whether the information provided for this Offering meets SABC policy requirements.	yes

### Uploading the Bulk Offering Upload Template.

1. Bulk Offering Upload can only be performed by specific Institution users.
2. An appropriate institution user can select ‘manage institution’, and then select the ‘Offerings Upload’ button. Instructions will be displayed on-screen.
3. Bulk Uploads should be used carefully – once submitted into the system, there is no way to remove them ‘in bulk’ or reverse your actions.
4. Save the excel template as a CSV UTF-8 (\*.csv) file type.
5. Ensure that you have deleted the example rows (lines 2 & 3) from the file before uploading.
6. Select the .csv file to upload and click ‘validate’. This will review the upload to detect any **errors** and/or **warnings**.
  - a. An error occurs when data is entered incorrectly, prompting a validation failure. The upload cannot be officially submitted until all errors are resolved.
  - b. A warning occurs when the data entered will prompt a mandatory ministry review before the Offering is approved. The excel file can be submitted despite warnings.
7. Correct any **errors** in the spreadsheet and re-validate.
8. Identify any remaining **warnings and** resolve them if applicable. The file can be submitted with warnings but ensure that warnings are submitted only when a ministry review is required for approval.
9. When no errors remain, select ‘create now’, which will formally submit all Offerings from the template.