



# Learning Provider Portal Quick Guide

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## Export Learner Information via CSV

Please refer to section 10 of the User Guide for full and detailed instructions on exporting learner information.

Within the 'Learner Search' and 'Learning Aim Search' screens of the Learner Information section of the Learning Provider Portal users are able to export learner information in CSV format (previously this was only available via XML).

There are two options at the bottom of the 'Learner Search' and 'Learning Aim Search' screens; 'Export XML Results' and 'Export CSV Results'.

**Learner Search** | **Learning Aim Search**

You have learners who currently do not have a ULN

Academic Year: 18/19

Additional Learning Reference Number:   Search for blanks

Start Date From: dd mm yyyy | Start Date To: dd mm yyyy

Forename:  (Use wildcards to find more matches e.g. joh%)

NINO Verified?:

End Date From: dd mm yyyy | End Date To: dd mm yyyy

Surname:  (Use wildcards to find more matches e.g. Smi%)

Last Assessment Date From: dd mm yyyy | Last Assessment Date To: dd mm yyyy

Date of Birth: dd mm yyyy

Unique Learner Number:   Search for blanks

Customer Reference Number:

CoC Applied?: Please Select

CoC Type Applied: View All

Group Name: Please Select

Number of Records to Display per Page: 25

**Application States**

Available		Selected
Applications in Progress	→ Add	
Eligibility Incomplete	→ Add All	
Missing Evidence		
Approved	← Remove	
Cancelled		
Held Pending Budget Approval	← Remove All	

[Clear Search](#)

To export the results as CSV, as with XML exports, a filename should be entered and then 'Export CSV Results' selected.

**Results Export**

Enter your filename

To select the destination to export and save the file to, the on screen prompts specific to your system should be followed.

**Please note-** When opening a CSV file in Excel, Excel performs certain behaviour such as removing zeroes from the start of numbers.

One way in which to prevent this from happening is to import the CSV file as follows:

- 1) Open a blank excel sheet.
- 2) Select all cells (CTRL+a) and format them as text (right click->format cells).
- 3) Open your CSV in notepad (you can do so by dragging the file into an open notepad window).
- 4) Copy all of the content of the CSV and paste it into the first cell in excel. Notice that a "Paste Options" icon appears somewhere at the bottom.
- 5) Click on the small arrow on the right of that icon, and select "use text import wizard". This will open a wizard...
- 6) Make sure "delimited" is selected and click "next"
- 7) Select "comma" and deselect "space" in the delimiters area (you will see the columns arrange correctly in the sample below), then click "next".
- 8) In this step you define how to treat each column. Since we don't want excel to change anything, we'll define them all as "text": Click on the first column in the sample (it will be coloured in black); now scroll sideways all the way to the right and shift+click the last column; in "column data format" above, select "text".
- 9) Click "finish".