Tertiary Education Commission
Te Amorangi Mātauranga Matua

User Guide

Workspace 2

Contents

Overview

Purpose of this document

This guide sets out instructions and information for using the Workspace 2 system.

This document will show you how to:

- Access Workspace 2
- Navigate around Workspace 2
- Find your documents
- Submit data collections to the TEC
- Upload and submit documents to the TEC via Workspace 2
- Fix errors with data collections using the error report

Introduction to Workspace 2

Workspace 2 is a secure online system, which collects data and information from Tertiary Education Organisations (TEOs) in the sector and shares it securely with the Tertiary Education Commission (the TEC).

Workspace 2 is used by both TEOs and the TEC:

- TEOs can securely submit delivery data, forecasting data, Investment Plans, strategic intent documents and reports to the TEC. TEOs can also securely upload documents for the TEC to view.
- TEOs can view notices and documents published by the TEC.
- The TEC can review the data and documents uploaded/submitted by TEOs.

Note: Workspace 2 does NOT replace submission of information using the SDR or ITR.

Site Overview

Within Workspace 2 there are three main pages:

- **Home** – from here you can see any updates from TEC.
- **My Documents** – this is the working area of the site, where you will view/upload/update your documents.
- **Archived** Documents – documents older than 6 months (excluding data collection documents) will be moved into the Archived documents area.

If you need help using Workspace 2, you can contact the Customer Contact Group on 0800 601 301 or CustomerService@tec.govt.nz.

Before you get started

You should access the site using your desktop/laptop personal computer, not via a mobile device.
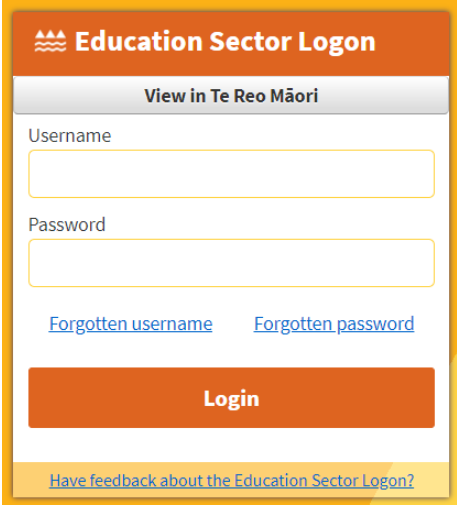
System Requirements

Below are the web browsers that support Workspace 2; please ensure that you are using:

- Google Chrome (latest version)
- Edge (2 most recent major versions)
- Firefox (latest version)
- Safari for MacOS (2 most recent major versions)

We also recommend that you are using Office 2013 or the desktop version of Office 365. Workspace 2 does not support Google Docs or the online version of Office 365 due to the formulas in the spreadsheets.
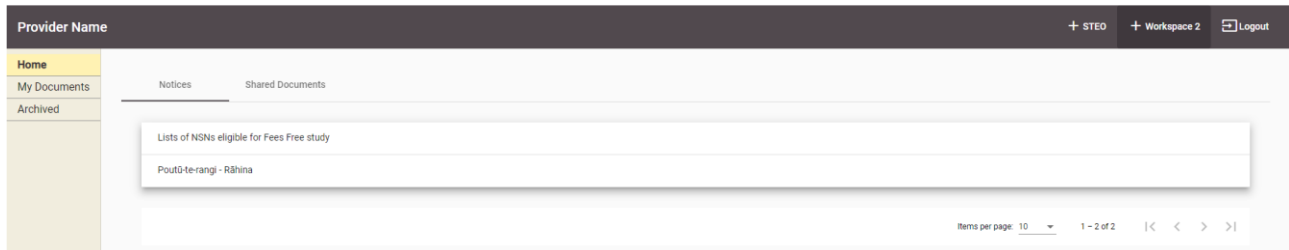
Logging in to Workspace 2

Complete the following steps to log in to Workspace 2.

Step	Action
1.	Enter https://web.dxp.tec.govt.nz into your web browser
2.	Click **Login using ESL** Select a provider for login ▲▲▲ **Login using ESL** **Login for TEC staff members**
3.	Enter your ESL username and password ≋ **Education Sector Logon** **View in Te Reo Māori** Username Password Forgotten username Forgotten password **Login** Have feedback about the Education Sector Logon?
4.	Click **Login**

Home – Notices and Shared Documents

When you first log in to Workspace 2 you will be taken to the **Home** page.

This is where you can see **Notices** that have been published by the TEC. Click on a notice to view the details.
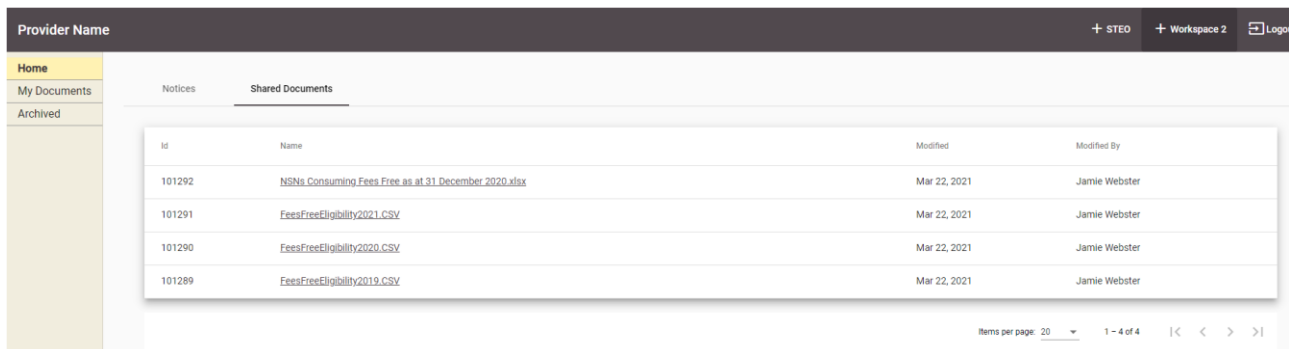
Select **Shared Documents** to view a list of documents that have been shared by TEC with all TEOs. Click on a row or the document title to download it.

Using the navigation menu on the left of the page, you can access the other areas of Workspace 2.

My Documents

To access your documents in Workspace 2, click on **My Documents** in the left hand navigation.
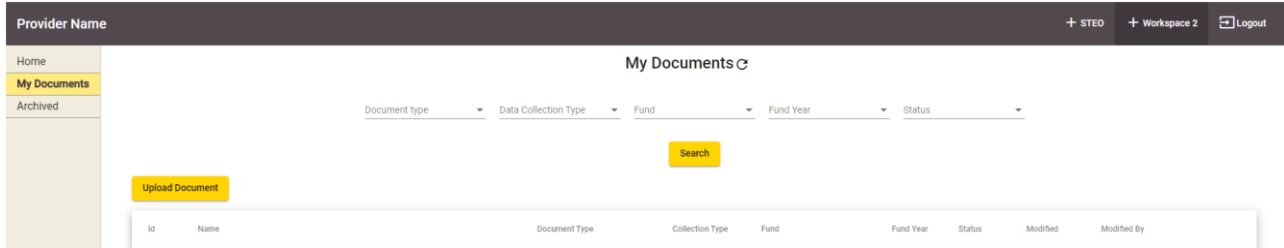
From the My Documents page, you can:

- View the status of a document
- View/edit documents that have been uploaded
- Upload documents to share with the TEC
- Search for documents using the filters
- Delete documents that your organisation has uploaded

Searching for documents

To search for documents you can either scroll and page through the list or filter based on specific criteria.
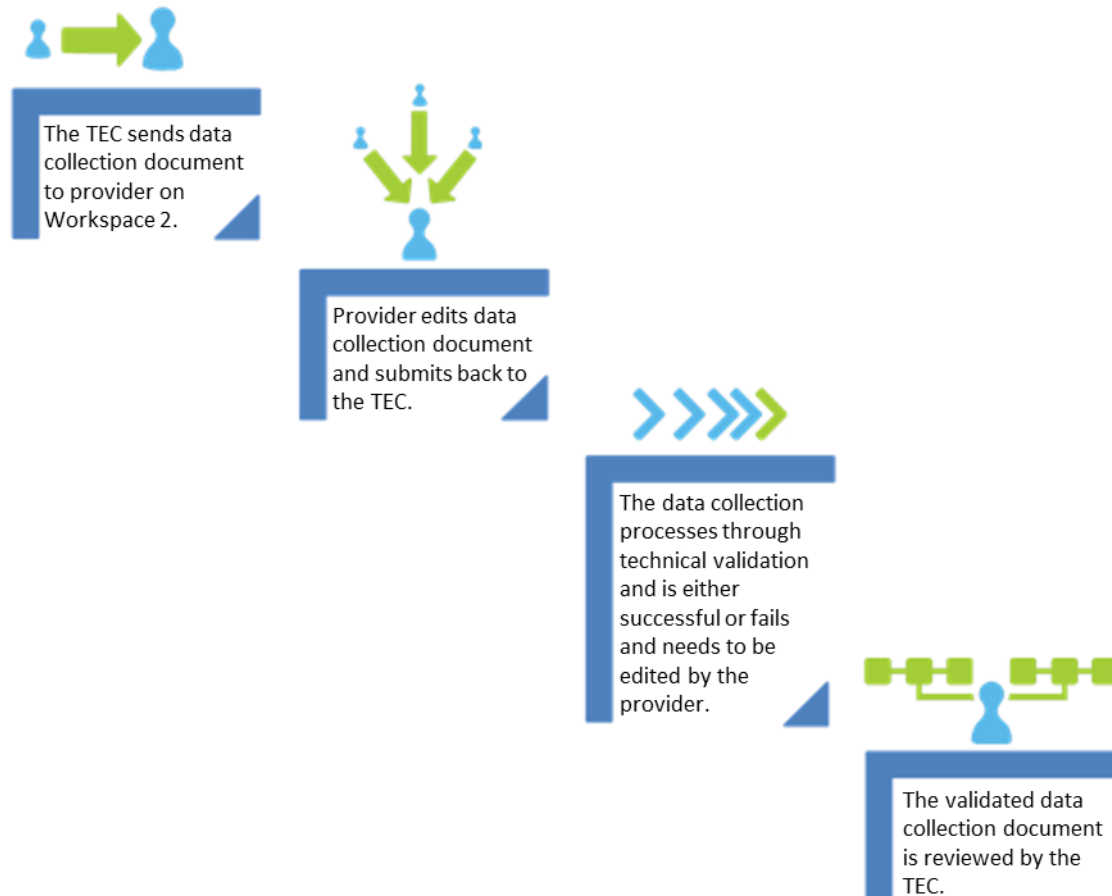
Step	Action
1.	Click on the dropdown list you would like to filter by: • **Document Type** – this could be a Data Collection Document, error report or other type of report • **Data Collection Type** – this could be actuals, forecast or commitments • **Fund** – a list of funds that are associated with documents in your list • **Fund Year** – the year the document you are looking for relates to • **Status** – the statuses that are displaying on your documents. There is a full list of potential statuses on page 24. *The dropdown criteria will only be populated with options that match your documents.*
2.	Select as many filters as you would like to apply.
3.	Click **Search**.
4.	Your document list will be filtered based on your search criteria

Submitting Data Collection Documents to the TEC

The TEC will provision a Data Collection Document to your **My Documents** area on Workspace 2. You can then complete and submit the document back to the TEC.

This guide will show you the steps required to complete and submit your data collection document

The picture below shows a high level process of the steps taken.

The TEC sends data collection document to provider on Workspace 2.

Provider edits data collection document and submits back to the TEC.

The data collection processes through technical validation and is either successful or fails and needs to be edited by the provider.

The validated data collection document is reviewed by the TEC.

1. Data Collection Document/Report Overview

The Data Collection Document is set up with a number of different tabs.

| Notes | Report | Working Sheet | Working Sheet 2 | Attestation |
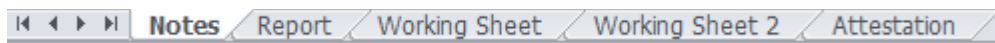
Below is an explanation of each tab you will see in your data collection document.

1.1 Notes/Instructions

The notes/instructions tab sets out:

- Information about the provider
- Guidelines for completing the Report tab

Information

A summary of your information is shown at the top of the tab; this will be slightly different depending on the type of data collection/report. An example is shown below:

Reporting Actuals YTD as at:	31/12/15	Number of learners enrolled in the year to date	0
Reporting year:	2015	Learner hours delivered in 2014	0
Organisation name:	Test Provider	Learner hours delivered in 2015 YTD	0
Organisation edumis number:	9982	Learner hours to be delivered in 2016	0
		Total Learner hours to be delivered in Test Provider	0

Guidelines

The guidelines below the information section are there to help you understand which columns in the report tab will go through validation when the data collection is submitted to the TEC.

This will help you complete the report tab correctly before submission.

For example, *Learner start date - you must enter the learners start date in correct date format (dd/mm/yyyy). It must not be a future date.*

1.2 Report

The report tab is where the final data to be submitted to the TEC should be entered.

Every column on the Data Collection Document specifies a format that the information should be in.

⚠️ *Please ensure that you fill in the data using the specified format. If you do not use the specified format your submitted Data Collection Document will fail validation when you submit it to the TEC.*

Below is an example of columns and different format requirements:

National Student Number (NSN)	Learner start date (*Actual*)	Country of Origin	Region of delivery	Hours To Be Delivered Year End	Any explanatory comments
Number	*dd/mm/yyyy*	*DropdownList*	*Calculated*	*Decimal*	*Free text - no restrictions*

Format	Explanation
Dropdown	Please select a value from the Dropdown list only. These have been pre-populated by the TEC.
Calculated	This column is calculated and filled in automatically depending on the information you've entered in the preceding columns.
Decimal	You must enter a number as a decimal in this column.
Number	This must be a whole number.
Text	This must be a text value.
Date	This must be entered in the format specified of **dd/mm/yyyy** or validation will fail. *If you are finding your excel is automatically switching the date formats to US mm/dd/yyyy, please take a look at **Appendix 1 Changing Excel from US format to NZ format**.*
Free text – no restrictions	Any text can be entered here – there is no validation running against this column.

Columns cannot be added into the Report tab:

- *If columns are added in, the coding that sits behind the data collection will break;*
- *If this happens, the data collection document will fail validation when it is submitted;*
- *The TEC will need to provision a new data collection to your provider site and you will need to copy and paste the collection data into the new document in order to submit the data successfully.*

1.3 Working Sheet

The working sheet is a replica of the report tab. This sheet does not get validated through the Workspace 2 system when the data collection is submitted to the TEC.

You can edit this sheet to match your needs. For instance, you are able to add temporary additional data to help with your preparations.

1.4 Working Sheet 2

The second working sheet has been left blank. This sheet does not get validated through the Workspace 2 system when the data collection is submitted to the TEC.

This sheet is not locked at all and therefore you can edit this sheet to match your needs.

If you have entered student names into the working sheet, please ensure these are removed prior to submitting your Data Collection document. Under the Privacy Act the TEC is unable to accept names of students.
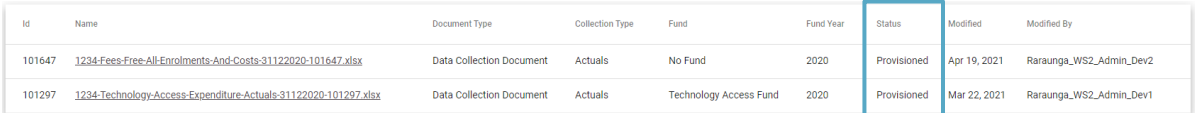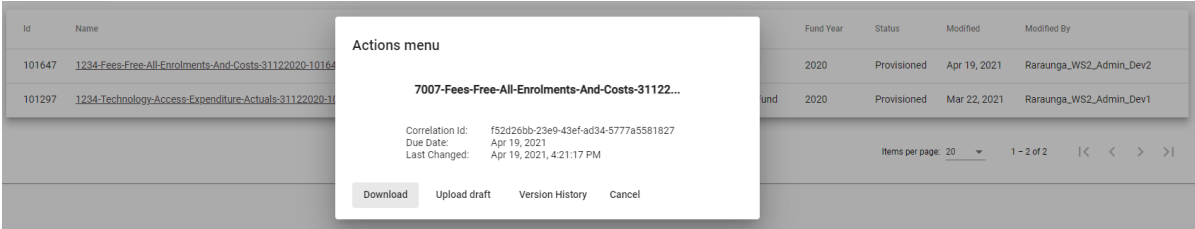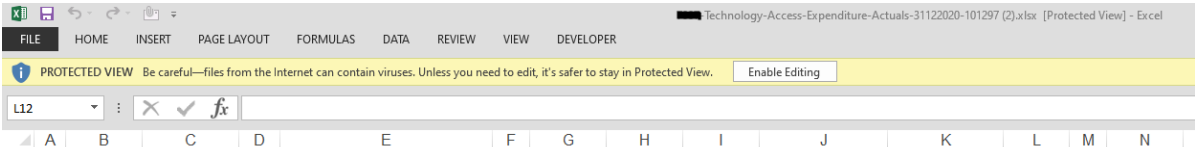
1.5 Attestation

Some data collection documents have an attestation tab, if your document has one, please fill this in.

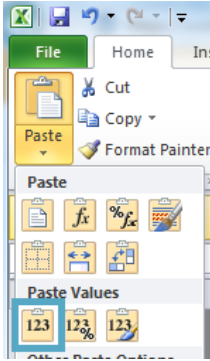# 2. Find/Open the Data Collection Document

Please use this section when the TEC has provisioned a data collection document to your provider site.

When the TEC has sent out a Data Collection Document it will show in the **My Documents** area as **Provisioned**. You are now able to start editing this Data Collection Document with the relevant information.

Step	Action
1.	Locate your Data Collection document by scrolling through your document list, or using the search filters to locate documents with a status of **Provisioned**.
2.	Download the Data Collection document by: • selecting the title of the document • or, selecting the row to display the Actions menu and then selecting **Download**
3.	Depending on your version of Microsoft Excel and its settings, you may need to select **Enable Editing** within the document to be able to view and enter data.

3. Edit a Data Collection Document

3.1 Copying and Pasting Data

If you are copying data from your organisation's spreadsheets and pasting it into the Data Collection document, ensure that you are pasting as a value.

This means that only the text or numbers are pasted into the document, and not the formatting from the spreadsheet you copied.

To do this, click on the drop down under the paste button, and select Values.
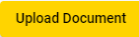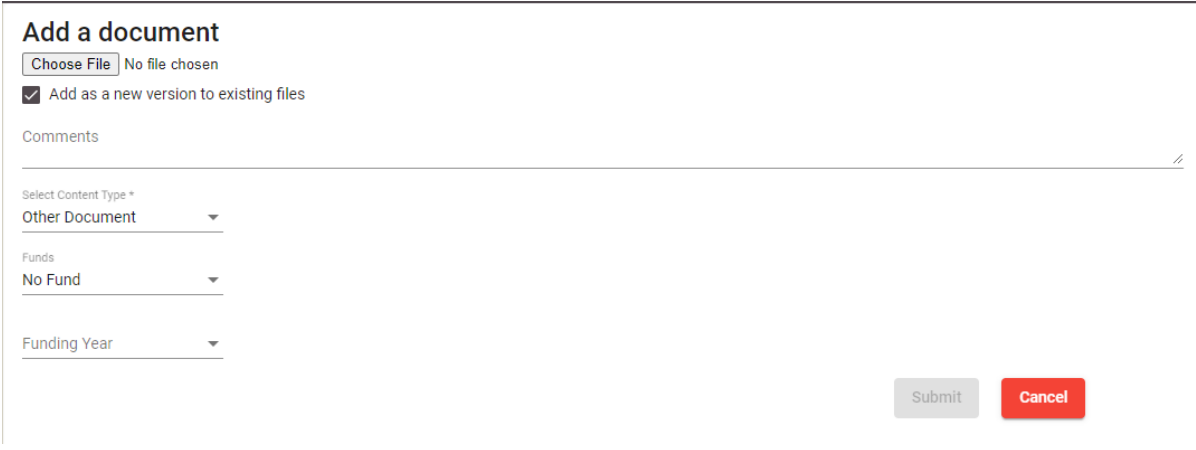
4. Upload a Data Collection Document

In order for other users to see the changes you have made to a Data Collection Document, you will need to ensure it is uploaded back in to Workspace 2.

You will need to **upload** your local version of the document as a new version to the one that already exists in Workspace 2.

There are two methods available to upload your document.

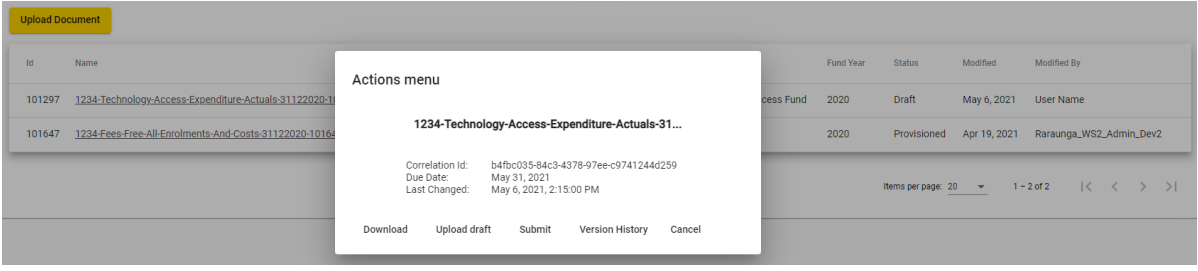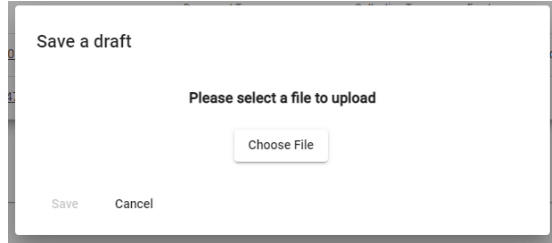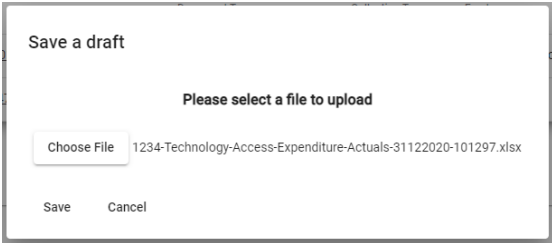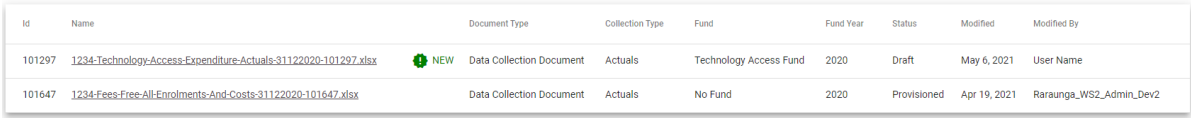### 4.1 Uploading your Data Collection document using Upload Document button

Step	Action
1.	Save your Data Collection Document ensuring that the document name is the same as on Workspace 2.
2.	From the **My Documents** page, select the **Upload Document** button. Upload Document
3.	The **Add a document** form will be displayed, click **Choose File** and locate your Data Collection document on your local device.
4.	Select **Data Collection Document** from the **Content Type** drop-down.

Step	Action
	Add a document Choose File	1234-Technology-Access-Expenditure-Actuals-31122020-101297.xlsx ☑ Add as a new version to existing files Comments -- Select -- Data Collection Document Other Document Strategic Intent Document Funding Year ▼ **Add a document** Choose File	1234-Technology-Access-Expenditure-Actuals-31122020-101297.xlsx ☑ Add as a new version to existing files Comments Select Content Type * Data Collection Docume... ▼ Funds No Fund ▼ Funding Year ▼
5.	Select the **Submit** button to upload your file as a new version. Submit
6.	You may need to refresh the **My Documents** page to be able to Submit the document for processing. Select the refresh curly arrow next to the My Documents title, or use your browser's refresh button. **My Documents** ↻
7.	The data collection document will now display in Workspace 2 with a Status of **Draft**. <table><tr><td>Id</td><td>Name</td><td></td><td>Document Type</td><td>Collection Type</td><td>Fund</td><td>Fund Year</td><td>Status</td><td>Modified</td><td>Modified By</td></tr><tr><td>101297</td><td>1234-Technology-Access-Expenditure-Actuals-31122020-101297.xlsx</td><td>NEW</td><td>Data Collection Document</td><td>Actuals</td><td>Technology Access Fund</td><td>2020</td><td>Draft</td><td>May 6, 2021</td><td>User Name</td></tr><tr><td>101647</td><td>1234-Fees-Free-All-Enrolments-And-Costs-31122020-101647.xlsx</td><td></td><td>Data Collection Document</td><td>Actuals</td><td>No Fund</td><td>2020</td><td>Provisioned</td><td>Apr 19, 2021</td><td>Raraunga_WS2_Admin_Dev2</td></tr></table> *You can continue editing the document right up until it is due to be submitted to the TEC. If you submit the Data Collection document early and want to re-edit it, please contact CustomerService@tec.govt.nz who will release it back to you.* Proceed to **Submitting your Data Collection Document**.
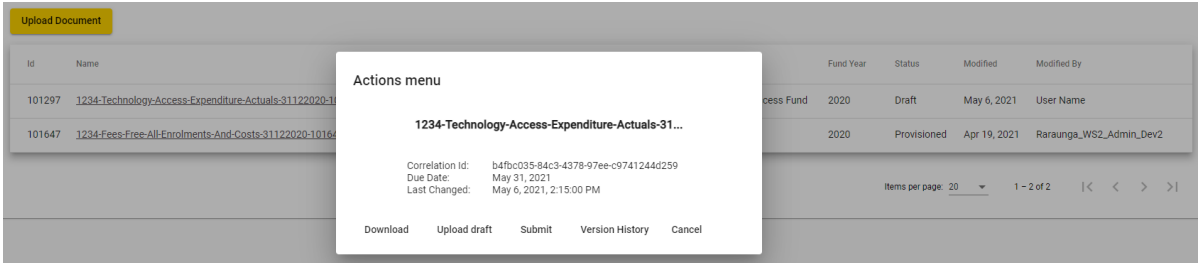
4.2 Uploading your Data Collection document using the Action menu

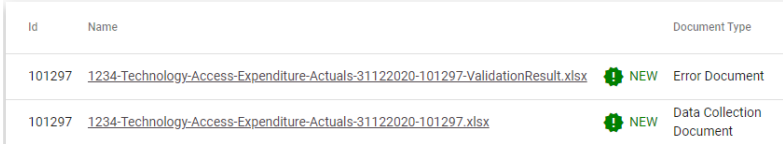| Step	Action
1.	Save your Data Collection Document ensuring that the document name is the same as on Workspace 2.
2.	From the **My Documents** page, locate the Data Collection Document that you want to update, and select anywhere on the row except from the Document Name to open the **Actions menu**.
3.	Select **Upload draft**, the select **Choose File** and locate your Data Collection document on your local device.
4.	Select **Save** to upload your file as a new version.
5.	The data collection document will now display in Workspace 2 with a Status of **Draft**.

You can continue editing the document right up until it is due to be submitted to the TEC. If you submit the Data Collection document early and want to re-edit it, please contact CustomerService@tec.govt.nz who will release it back to you.

Proceed to **Submitting your Data Collection Document**. |

5. Submitting your Data Collection Document

Once you have uploaded your updated Data Collection Document, it will display with a status of **Draft** instead of **Provisioned** and a **Submit** button will be available in the **Actions menu**.

The following steps outline how to submit your collection document to the TEC when due, and instructions outlining the different responses you may receive.

Step	Action
1.	Check that: • Your final data has been entered in the **Report** sheet • Any student names in the **Working** sheet have been removed • All fields in the document are in the correct format and meet the business rules in the Notes/Instructions tab • Each unit standard is entered in a separate cell (if applicable)
2.	From the **My Documents** page, locate the Data Collection Document that you want to update, and select anywhere on the row except from the Document Name to open the **Actions menu**.
3.	Select **Submit** from the **Actions menu**.
4.	Once you have submitted the Data Collection document, if it is a small file it will be validated immediately. If it is a large file, the status will change to **Submitted – Pending Validation.** The data collection document then goes through technical validation which verifies the data integrity, e.g. format, mandatory fields etc. *Validation of your submission can take up to **10 minutes**, so ensure you check back and refresh the page after submission to check the outcome.* <table><tr><td>**If your document status is…**</td><td>then…</td></tr><tr><td>Submitted</td><td>the Data Collection has passed technical validation, go to **Step 5**.</td></tr><tr><td>Submitted – failed validation</td><td>i. the Data Collection has failed technical validation ii. an error document will appear on your **My Documents** page above the Data Collection document. It will be named the same as your data collection document, with '- Validation result' beside it. iii. open the error document and review the errors – you can find a summary of the errors on sheet 2. iv. open your data collection document to fix the errors. *Make sure you are editing the version that you submitted and not a previous working file.* v. follow the instructions to upload your document. vi. go to **Step 1.**</td></tr></table>

Step	Action
5.	The TEC will start its investment/monitoring review. There will be a number of different document status' displayed throughout their review:

Status	Description
Under Review	The document has been submitted, passed technical validation and is being reviewed by the TEC.
Revise	The document has been submitted, however requires an amendment by the TEO.
Review Complete	The document is at a point where it has been reviewed and the TEC are happy with the content.
Agreed Amendment	An amendment to the document has been agreed/approved by the Board or delegated authority.
Cancelled	The document has been revoked/cancelled.

6. Error Document Overview

All Data Collection documents submitted through Workspace 2 will be technically validated to ensure the data supplied complies with the rules outlined in the collection document.

Workspace 2 will generate an error report to your My Documents page. Workspace 2 will not accept the submission of the data collection if any validation errors are found; any errors must be fixed and the data collection re-submitted.

Please note that only the first 1,000 rows with errors detected will be displayed in the error report.

6.1 Validation applied

The validation applied at submission checks:

- the data entered within a cell is the expected data type.
- if data has been entered in a row, all mandatory data types have been filled in within that row.
- the data collection document is the one expected to be returned to TEC (e.g. not a previous year's version).
- the data does not contain any duplicate rows of data.
- the data matches the acceptable ranges for submission (e.g. dropdown list values have been used where applicable, dates and numbers are within the ranges expected).
- the data aligns to the business rules outlined on the introduction/notes tab of your data collection document.

6.2 Error document layout

The error document will have two tabs:
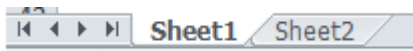
Sheet 1 contains the rows from your data collection document that contain errors. These will be populated with the row number from your data collection document so you can easily find and correct it.

Sheet 2 summarises the errors by field type. This allows you to work through your data collection document and fix similar errors at the same time.

6.3 Common errors and how to avoid them

Dates

Data Collection documents will fail validation if:

- the date field is left blank
- the date format is not dd/mm/yyyy or is not a valid date e.g. 31/02/2015
- the dates entered in actuals documents do not line up with reporting date of the collection document:
  - o Start date – must be before the reporting date and the end/anticipated end dates – not a future date
  - o End date – must be after the start date and before the reporting date – not a future date
  - o Anticipated end date – must be after the start date and reporting date – a future date

Unit Standards
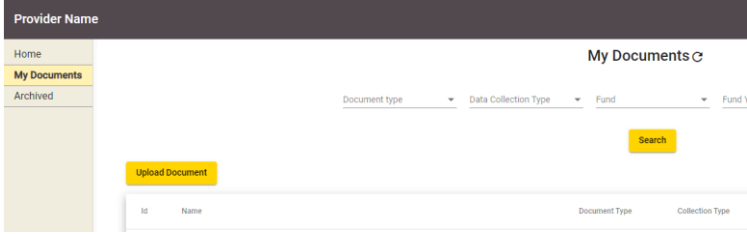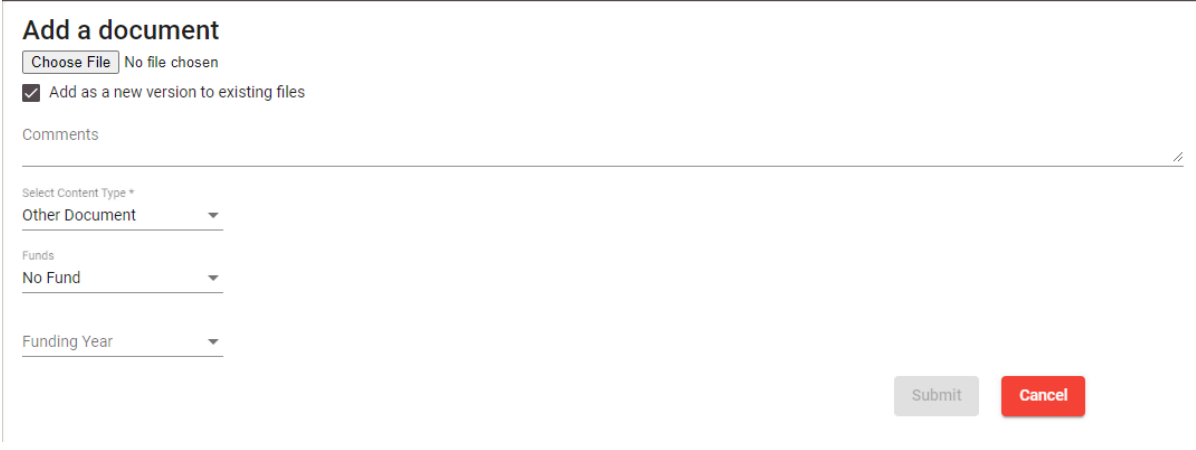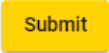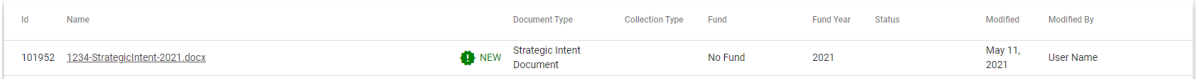
The unit standard code field will fail validation if:

- Multiple unit standards have been entered in one cell. These should be individually listed.
- The same unit standard and National Student Number have been duplicated in many rows.

Submitting other documents to the TEC

There may be instances when the TEC requests that you upload and submit documents through your site on Workspace 2, for example a Strategic Intent Document or a signed letter that has been scanned.
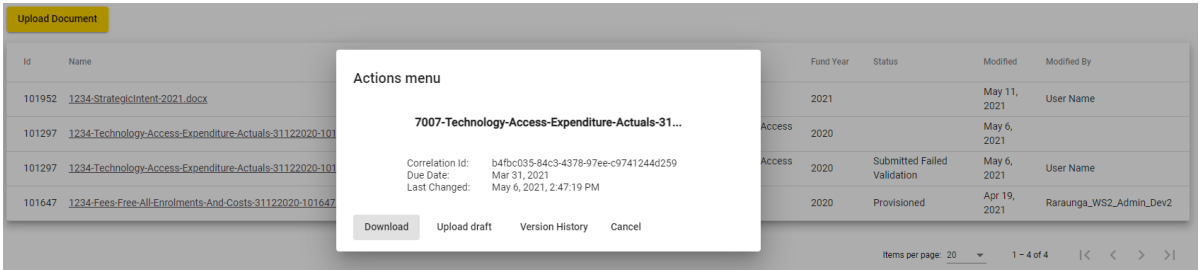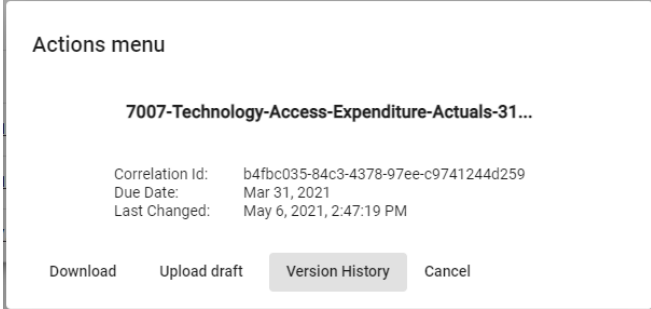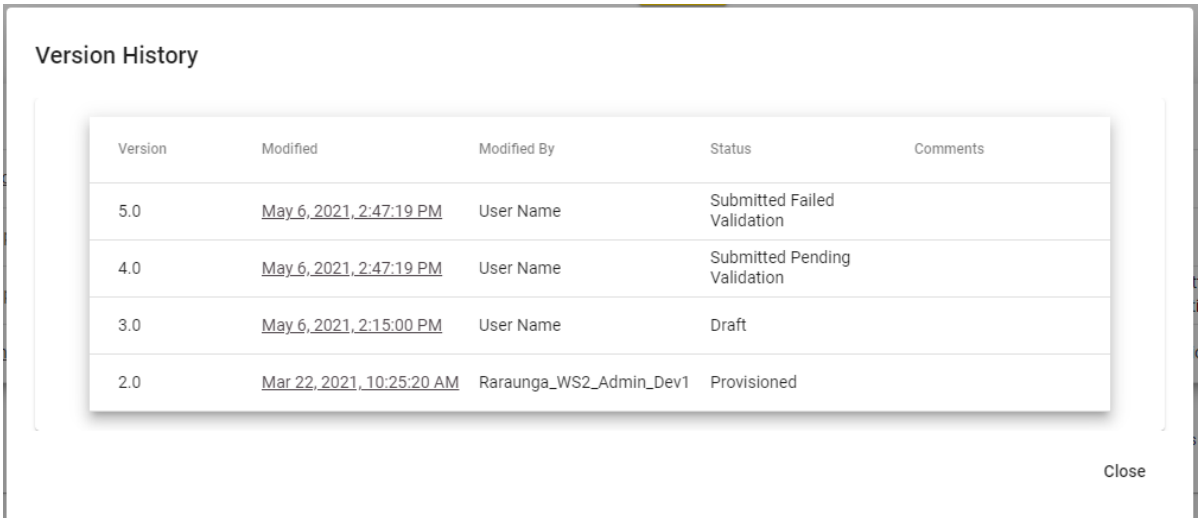
Step	Action
1.	Save your document to your local device.
2.	From the **My Documents** page, select the **Upload Document** button.
3.	The **Add a document** form will be displayed, select **Choose File** and locate your document on your local device.
4.	Enter an optional comment about the document.
5.	Select the content type from the drop down list: • Other Document, or • Strategic Intent Document
6.	If applicable, select the Fund and Funding Year that the document relates to. These fields are not mandatory.
7.	Select the **Submit** button to upload your file as a new version.
8.	You may need to refresh the **My Documents** page to be able to view the document. Select the refresh curly arrow next to the My Documents title, or use your browser's refresh button.
9.	The document will now display in Workspace 2.

Viewing/Restoring previous document versions

There may be occasions when you wish to view previous versions of your documents.

If you need to restore a previous version, you will need to download the previous version and then re-upload it using the standard upload process.

Follow the steps below to download a previous document version.
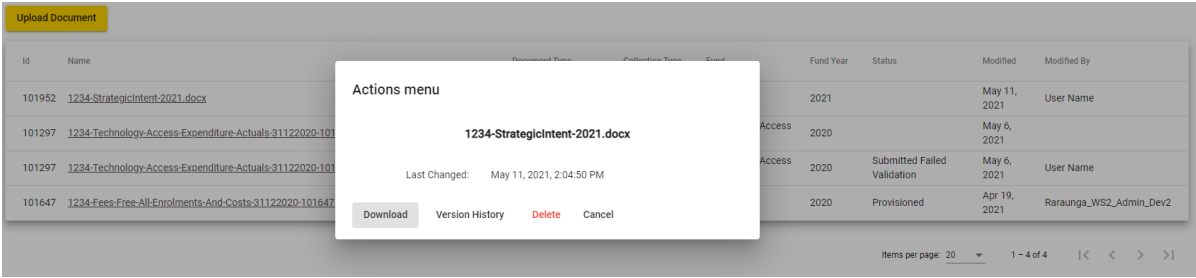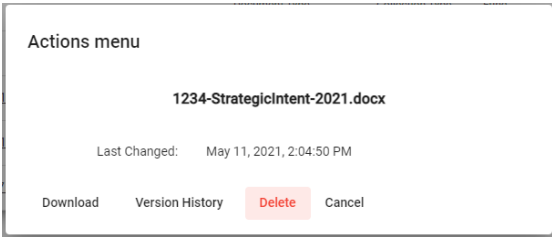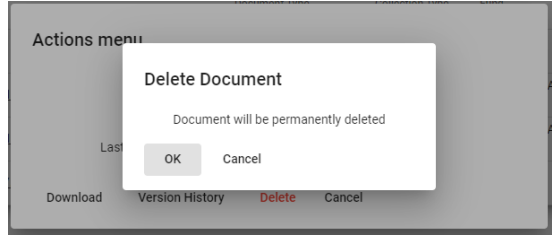
Step	Action
1.	From the **My Documents** page, locate the Document that you want to view a previous version of, and select anywhere on the row except from the Document Name to open the **Actions menu**.
2.	Select **Version History** from the **Actions Menu**.
3.	The versions of the document will be listed. Select the **Modified** date and time of a version to download the file for that version.

Deleting Documents

There may be occasions when you want to delete a document from Workspace 2, it may have been uploaded incorrectly, or is no longer relevant.

ℹ️ *You can only delete documents that have been uploaded to Workspace 2 by your organisation. If the document has been put on your provider site by the TEC, or has been submitted, it can only be deleted by the TEC.*

Follow the steps below to delete a document.

Step	Action
1.	From the **My Documents** page, locate the Document that you want to delete, and select anywhere on the row except from the Document Name to open the **Actions menu**.
2.	Select **Delete** from the **Actions Menu**.
3.	Select **OK** on the **Delete Document** dialog to confirm that the document will be deleted.
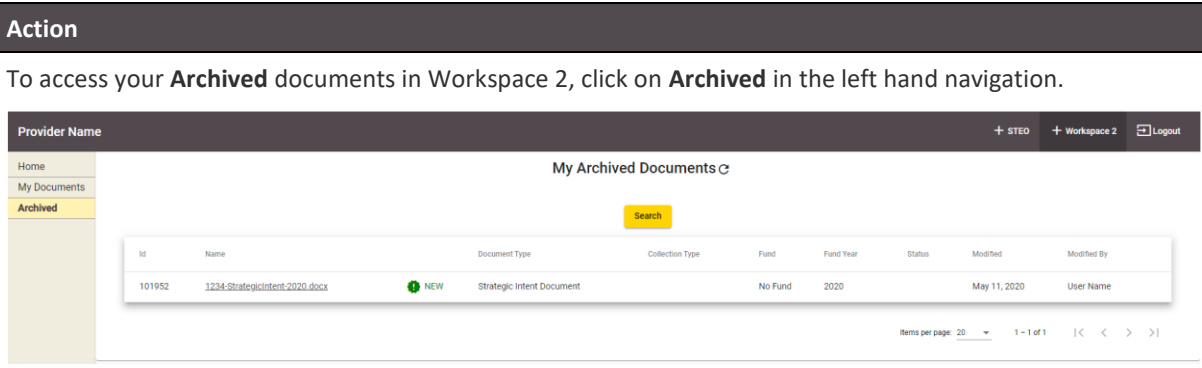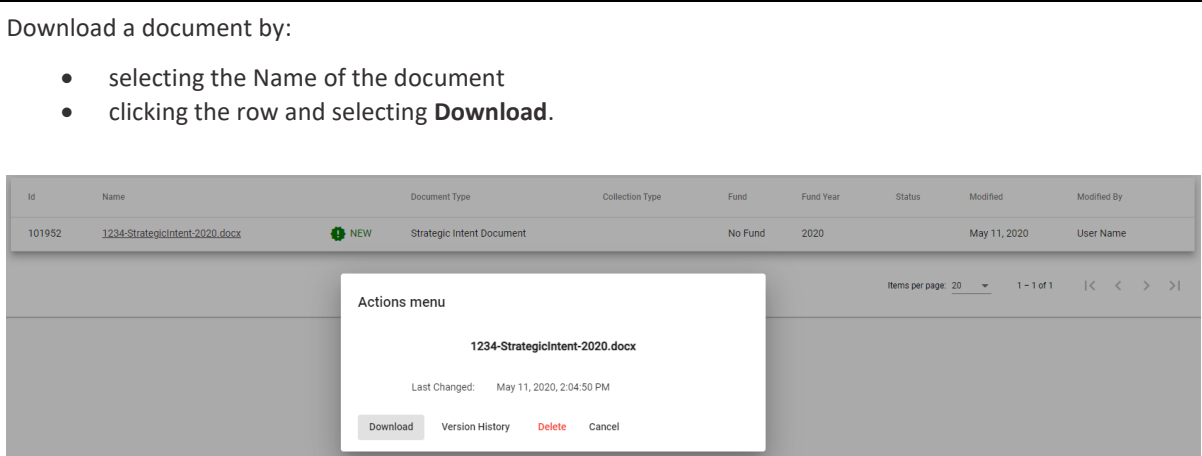
My Archived Documents

To ensure your My Documents page stays as clutter-free as possible, the My Archived Documents page has been created.

Data Collection Documents will always live within your My Documents page, however everything else will be automatically moved across to your My Archived Documents page after 6 months. This includes letters, documents you have uploaded, validation documents etc.

You can view your documents from here at any time.

Follow the steps below to view your archived documents.

Step	Action
1.	To access your **Archived** documents in Workspace 2, click on **Archived** in the left hand navigation.
2.	Download a document by: • selecting the Name of the document • clicking the row and selecting **Download**.

Document Status List

This section lists all of the document statuses. Depending on which stage of the process you are in will establish which status shows against your document in the **My Documents** page.

Status	Definition
Provisioned	The document has been provisioned into Workspace 2 ready for the provider to use.
Draft	The document has been edited and uploaded by the provider but not yet submitted.
Submitted – Pending Validation	The document has been submitted, and is pending validation.
Submitted – Failed Validation	The document has been submitted and validation has failed.
Submitted – Failed Submission	The document has been submitted but was not passed through for Validation. Please contact CustomerService@tec.govt.nz.
Submitted	The document has been submitted and passed system validation checks.
Under Review	The data collection document has been submitted, passed validation and is being reviewed by the TEC.
Revise	The data collection document has been submitted, however requires an amendment by the provider.
Review Complete	The data collection document is at a point where it has been reviewed and the TEC is happy with the document content.
Agreed Amendment	An amendment to the document has been agreed/approved by the Board or delegated authority.
Cancelled	The data collection document has been revoked/cancelled.

Appendix 1 - Changing Excel from US format to NZ format

Microsoft products will try to default their language and formatting to the US settings.

You may run into difficulties with your Data Collection Document if:

- You are using Safari/Office for Mac.
- You are copying and pasting values from another document in US format into your data collection document.
- Your computer is set to US formatting, locally within Excel or globally across your computer.

What's the issue?
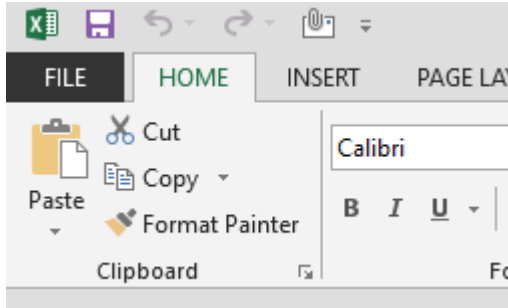
The main thing that this affects is how the date format works, as the US date format is mm/dd/yyyy and the NZ format is dd/mm/yyyy.

The reason that this becomes an issue is because the Workspace 2 system only understands dates in NZ formatting. This is especially important as when you submit the data collection document, it goes through "technical validation" which checks for formatting errors. If the date is in the US format, then Workspace 2 effectively sees this as an error.
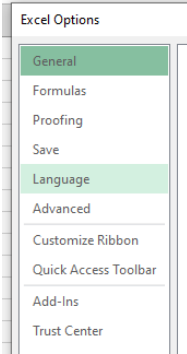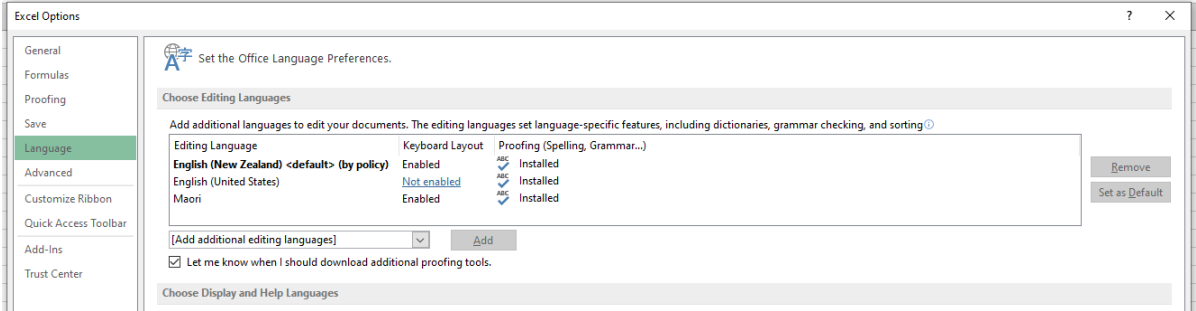
For example, if excel is set up in US format, when you enter 02/11/2015, the cell switches to 11/02/2015. If you needed to enter 25/02/2015, excel does not read it as a date as it does not recognise '25' as a month and therefore it formats as a text cell, which again won't pass validation.

How can you fix it?

First you need to check if it is in fact US formatting in Excel causing the validation issues.
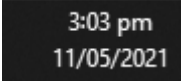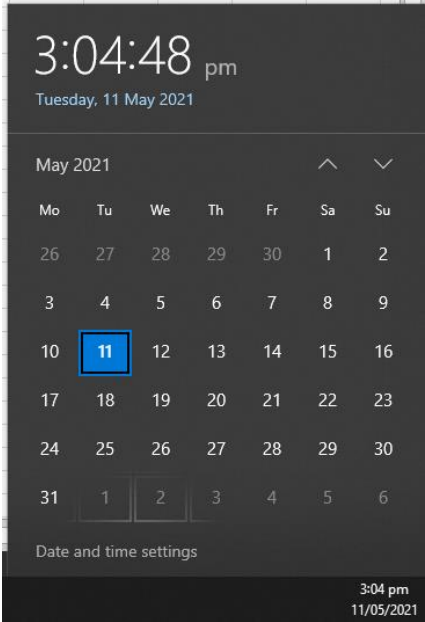
Step	Action
1.	Click on **File** in the Excel menu.
2.	Select **Options**.

Step	Action
3.	This will open a pop up window. Click **Language**.
4.	Ensure that **English (New Zealand)** is Enabled.
5.	Click **OK**.

If that doesn't work, there may be a global setting on your system to put all applications into US format. Use the following steps to check and correct this if required.

Step	Action
1.	Select the date/time area on the bottom right of your screen. 3:03 pm 11/05/2021
2.	Select **Date and time settings** 3:04:48 pm Tuesday, 11 May 2021 May 2021 | Mo	Tu	We	Th	Fr	Sa	Su
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6	 Date and time settings 3:04 pm 11/05/2021
3.	Ensure that the **Time zone** is set to Auckland, Wellington.

If you are still having problems, please contact Customer Contact.

Frequently Asked Questions

These FAQs have been developed based on feedback by providers. We intend to update these as time goes on and we get more feedback. Please send any queries/feedback to Customer Contact on customerservice@tec.govt.nz.

Access to Workspace 2

1. Who can access Workspace 2?

Providers can only access Workspace 2 using their ESL login if they have the Workspace role associated with their ESL login.

If a provider has accessed, for example, ERS, previously this does not automatically give them access. If the ESL login does not have the Workspace role associated with it, the provider will need to request this via the Ministry of Education (who manage ESL logins) by using the forms on this page: https://services.education.govt.nz/education-sector-logon/.

If the provider believes that they can access Workspace, they should try this before contacting Customer Contact just to double check it's not an issue with the provider's login credentials.

Completing the data collections/spreadsheets

2. Can I add columns in the Report tab?

You cannot add columns to the "Report" tab as this is the one that gets validated by the system and adding columns would make a spreadsheet fail validation.

We've added in two Working Sheets (one is a replica of the Report tab and the other is left blank) so you can add columns and change things in here if needed before copying over to the Report tab

3. Can we use student names?

We cannot accept first and last names of students. If you put these into the Working tab please ensure that you DELETE these before submitting to the TEC. We are now unable to accept names of students due to the Privacy Act.

4. I'm having issues with entering the dates into the spreadsheet, is there a reason for this?

Some providers have English (US) formatting in their excel spreadsheets, see Appendix 1 on how to change to English (New Zealand).

5. Why doesn't the number that I see in the spreadsheet match the data that I entered, it has been rounded?

Some collection spreadsheets have Excel formatting applied that will make numbers display to a certain number of decimal places. The underlying data in the cell will be the data that you entered, and we will receive that number.

Example

A fee Code of 18.5 has been added. The Excel formatting makes it display as 19. If the cell is selected, the formula bar shows that the actual data in the call is 18.5, this is the value that our systems will process.

18.5								
G	**H**	**I**	**J**	**K**	**L**	**M**	**N**	**O**
tudent Course thdrawal Date	Course EFTS Factor	Source of Funding	Course Tuition Fee (GST Exclusive $)	GST charged on the Course Tuition Fee	Compulsory Course Costs Fee (GST Exclusive $)	GST charged on the Compulsory Course Costs Fee	Fee Code	Fee Description
	0.1250	01	791.22	118.68	0.00	0.00	19	Student Service Fees 2021 Semester T

Web Browsers

6. What Web browser should I use?

Below are the web browsers that support Workspace 2; please ensure that you are using the latest version:

- Google Chrome (latest version)

- Edge (2 most recent major versions)

- Firefox (latest version)

- Safari for MacOS (2 most recent major versions)

Error when uploading or download a file

7. Why do I receive an error when trying to upload or download a document?

Workspace 2 will scan every document that is uploaded or downloaded for malware. This helps to protect TEOs and the TEC. Any file that fails the scan will be prevented from being uploaded or downloaded. Any file that is unable to be scanned will also be prevented from being uploaded or downloaded. Files that have been encrypted or password protected cannot be scanned so are not supported on Workspace 2. Embedded PDFs that are in Word documents cannot be scanned so are not supported on Workspace 2.

Changes are not reflected in the User Interface

8. Why is the change that I just made not being displayed immediately?

To improve the performance of the application, the processes the put data in and read it out are separate. There is a process that runs in between to keep changes synchronised. Sometimes a change that you make such as uploading a document, or the draft version of a data collection document is not immediately displayed through the user interface.

To see the changes, wait 1-2 seconds and select the application's refresh button ↻ , that is next to the "My Documents" heading