



Education & Skills  
Funding Agency

# **Internal Team Process: Document exchange**

**March 2021**

## Content

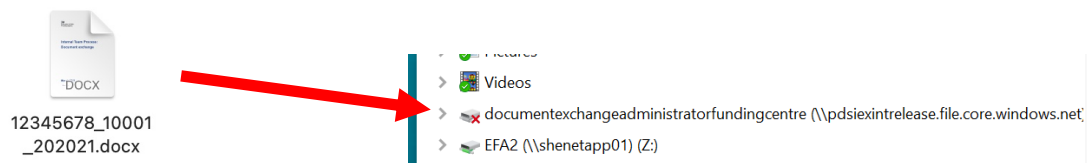
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## Document upload

1. To upload a document to Document exchange, your drive should be mapped and access to the shared drive should be added.

Before you begin, you need the

- a. documents will need to be named accordingly – codes can be found [there](https://sfs.preprod.skillsfunding.service.gov.uk/document-exchange/settings/products) (https://sfs.preprod.skillsfunding.service.gov.uk/document-exchange/settings/products)
  - b. naming convention to be [UKPRN]\_[ProductId]\_[AcademicYear].[FileExtension] – like '12345678\_10001\_202021.docx'
2. Once the files have been named, you need to drag and drop them into the mapped drive




3. When the file is transferred to the mapped drive, it will be visible in the Document exchange service to map drive

## Login to Document exchange

You can log in to Document exchange on  
<https://skillsfunding.service.gov.uk/document-exchange>

1. To sign in, you should click on the 'sign in or create an account' button



**BETA** This is a new service – your [feedback](#) will help us to improve it.

## Document exchange

Use this service to:

- submit documents to the Education and Skills Funding Agency (ESFA)
- view and download documents published by the ESFA


[Sign in or create an account >](#)

**Before you start**


You need to have a [DfE Sign-in account](#) to use this service.

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1. You will need to enter your sign-in details (your email address and password)



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## Department for Education Sign-in

DfE Sign-in allows you to access several important services in the education sector, such as COLLECT.

**Sign-in**

Email address

Password

[Forgotten your password?](#)


☐ By continuing you accept the [terms and conditions](#).

[Sign in](#) [Create account](#)

**Need help?** [See our DfE Sign-in help guides](#)

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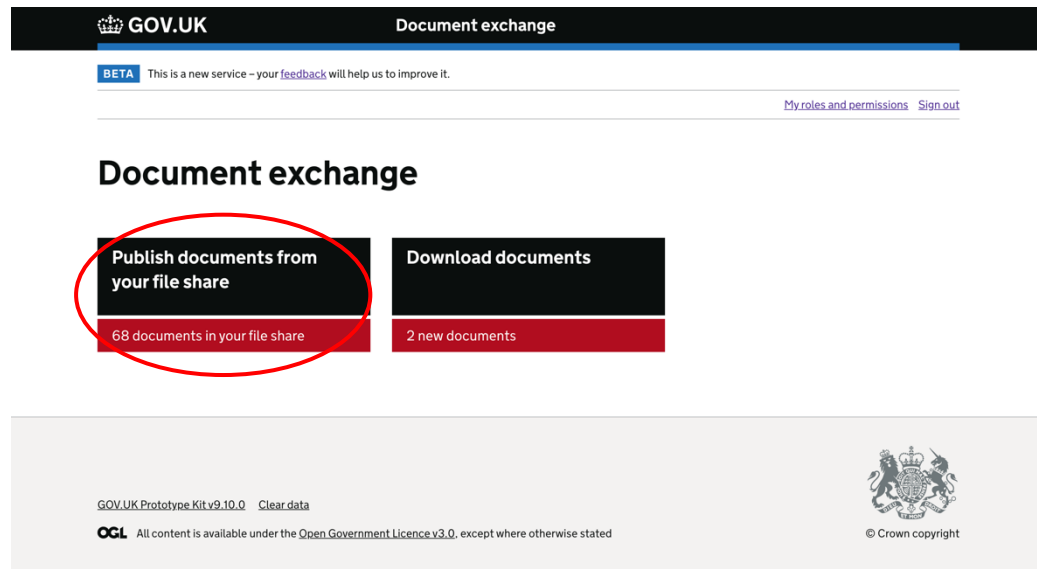
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## How to publish documents

To publish documents, you need to:

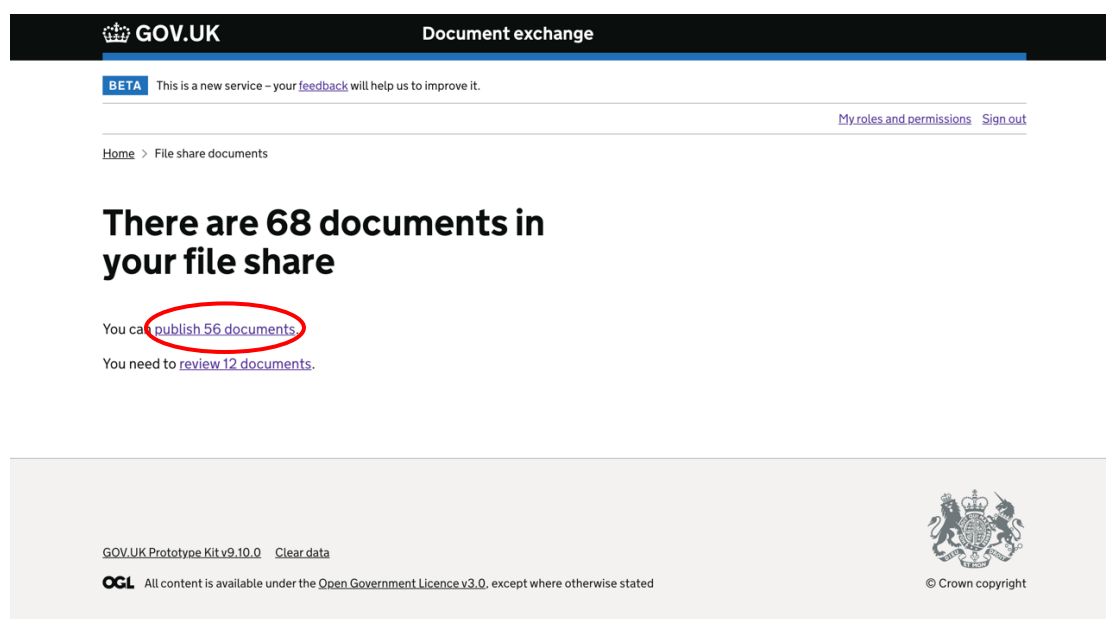
1. Select the 'Publish documents from your file share' button



2. On the next page, you will see the total number of documents separated into two categories:

- 'You can publish documents'
- 'You need to review documents' (see page 6 for details)

To publish documents, you need to click the first link. For example, 'You can publish 56 documents'.



3. On the next page 'Publish your documents', you need to:

- link the document type that you are uploading
- select '**Publish all**' at the bottom of the page

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[My roles and permissions](#) [Sign out](#)

[Home](#) > [File share documents](#) > Publish your documents

## Publish your documents

Select a document type to publish.

Select a team

☒ Funding centre

☐ Risk assurance

Select a document type

☒ 14 to 16 revenue funding allocation statements

☐ 16 to 19 reconciliation statements

☐ Business case audit evidence requests

☐ Data and management information (MI) reports

☐ Local authority (LA) student number summaries

☐ Non maintained special school allocation statements

Document name	Document type
10000604_10003_201819.pdf	14 to 16 revenue funding allocation statement
10000604_10003_201819.pdf	14 to 16 revenue funding allocation statement
10000604_10003_201819.pdf	14 to 16 revenue funding allocation statement
10000604_10003_201819.pdf	14 to 16 revenue funding allocation statement
10000604_10003_201819.pdf	14 to 16 revenue funding allocation statement
10000604_10003_201819.pdf	14 to 16 revenue funding allocation statement
10000604_10003_201819.pdf	14 to 16 revenue funding allocation statement
10000604_10003_201819.pdf	14 to 16 revenue funding allocation statement

Showing 1 to 8 of 8 documents

You can publish **8** 14 to 16 revenue funding allocation statements.

Publish all

[Clear selections](#) [Back to top](#)

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4. When you select 'publish all' you will then need to confirm you want to publish your documents on the next page.

5. To confirm publishing your documents, you need to select 'Yes' and then the 'Continue' button:

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[My roles and permissions](#)

[Sign out](#)

Home

>

File share documents

>

Publish your documents

>

Confirm

Are you sure you want to publish all 14 to 16 revenue funding allocation statements?

Selecting Yes will publish 8 documents.

☐ Yes

☐ No


Continue

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[Clear data](#)

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To not publish your documents, you should select 'No'. You will return to the 'Publish your documents' page.

- If you select 'Yes', you will then see a confirmation screen for your published document:

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This is a new service – your [feedback](#) will help us to improve it.

[My roles and permissions](#)

[Sign out](#)

You've published 8 14 to 16 revenue funding allocation statements

What happens next

We'll send you an email to confirm that we've published your documents. It may take a few minutes for all of your documents to show in provider view.

Publish more documents

You can add more documents to your file share, then publish them using document exchange.


Finish

GOV.UK Prototype Kit v9.10.0

[Clear data](#)

OGL

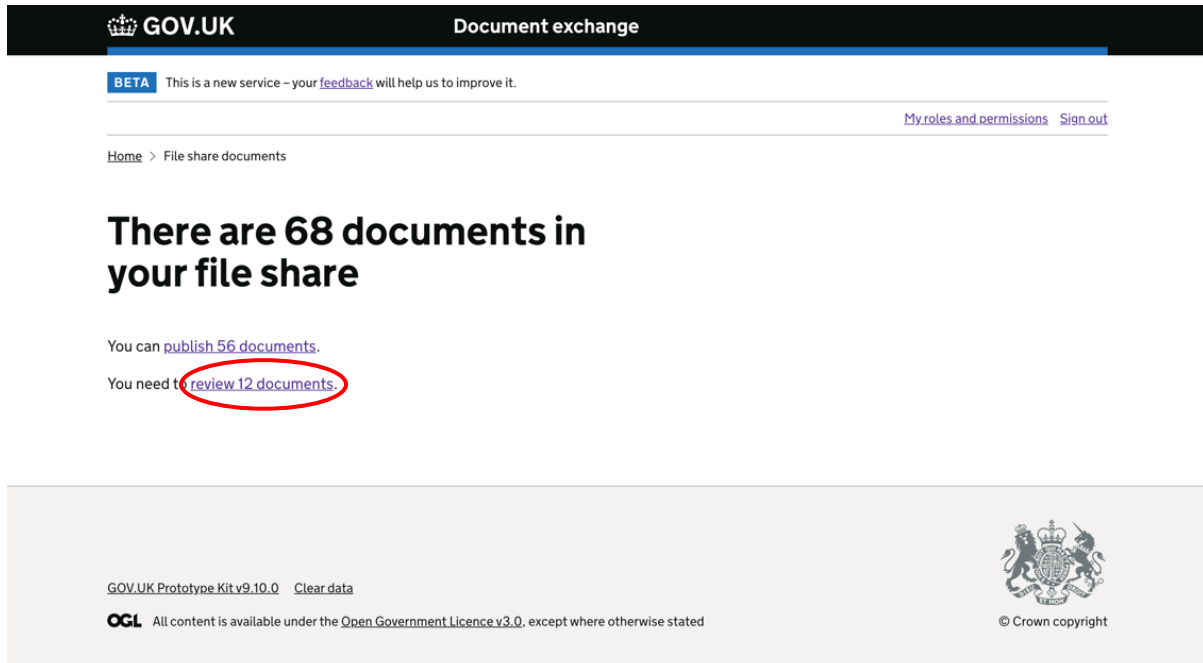
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## How to review documents

1. Incorrect documents will appear under the 'review' section. To view incorrect documents, you should select the second link: "You need to review documents".



The screenshot shows the GOV.UK Document exchange interface. At the top, there is a black header with the GOV.UK logo and the text 'Document exchange'. Below the header, a blue banner reads 'BETA This is a new service – your [feedback](#) will help us to improve it.' On the right side of the banner, there are links for 'My roles and permissions' and 'Sign out'. Below the banner, a breadcrumb trail shows 'Home > File share documents'. The main heading states 'There are 68 documents in your file share'. Below this, it says 'You can [publish 56 documents](#).' and 'You need to [review 12 documents](#).' The link 'review 12 documents' is circled in red. At the bottom of the page, there is a footer with the text 'GOV.UK Prototype Kit v9.10.0 [Clear data](#)', the OGL logo, and the text 'All content is available under the [Open Government Licence v3.0](#), except where otherwise stated'. On the right side of the footer, there is the Royal Coat of Arms and the text '© Crown copyright'.

2. Once you select the 'Review documents' link, you will go to the 'Review your document names' page:
  - You can remove the documents by clicking on the 'Remove selected documents' button
  - Or you can create a report of the incorrect documents by clicking on the 'Download selected document names and errors ODS' button



## Review your document names

1. Select a list of document names and errors.
2. Download these as an OpenDocument Spreadsheet (ODS).
3. Remove these documents from the table below.
4. Correct the document names in your local area.
5. Add the documents back into the file share.

0 documents selected

Filter by document name error

☐ Document type code is not a valid format
 ☐ Team is not authorised to publish
 ☐ The document name contains invalid characters
 ☐ UKPRN is not recognised in the system

Filter by document type

☐ [Unknown products]
 ☐ Allocation calculation toolkits
 ☐ Data and MI reports
 ☐ Grants assurance
 ☐ Post 16 grant assurances

[Clear filters](#)

Document name	Document name error	Document type
<input type="checkbox"/> 10000231_99999_202021.xlsx	Document type code is not a valid format	[Unknown product]
<input type="checkbox"/> 10001234_10091_202021.xlsx	Team is not authorised to publish	Grant assurance
<input type="checkbox"/> 10005064_10003_192020 - Copy.xlsx	The document name contains invalid characters	Data and MI report
<input type="checkbox"/> 10007798_10001_202021 - Copy.xlsx	The document name contains invalid characters	Allocation calculation toolkit
<input type="checkbox"/> 10016271_10001_202021 - Copy.xlsx	The document name contains invalid characters	Allocation calculation toolkit
<input type="checkbox"/> 10016903_10091_202021.xlsx	Team is not authorised to publish	Grant assurance
<input type="checkbox"/> 10037395_10036_202021.xlsx	Team is not authorised to publish	Post 16 grant assurance
<input type="checkbox"/> 10070097_10001_202021 - Copy.xlsx	The document name contains invalid characters	Allocation calculation toolkit
<input type="checkbox"/> 12345678_10001_202021 - Copy (2).xlsx	The document name contains invalid characters	Allocation calculation toolkit
<input type="checkbox"/> 12345678_10001_202021.xlsx	UKPRN is not recognised in the system	Allocation calculation toolkit

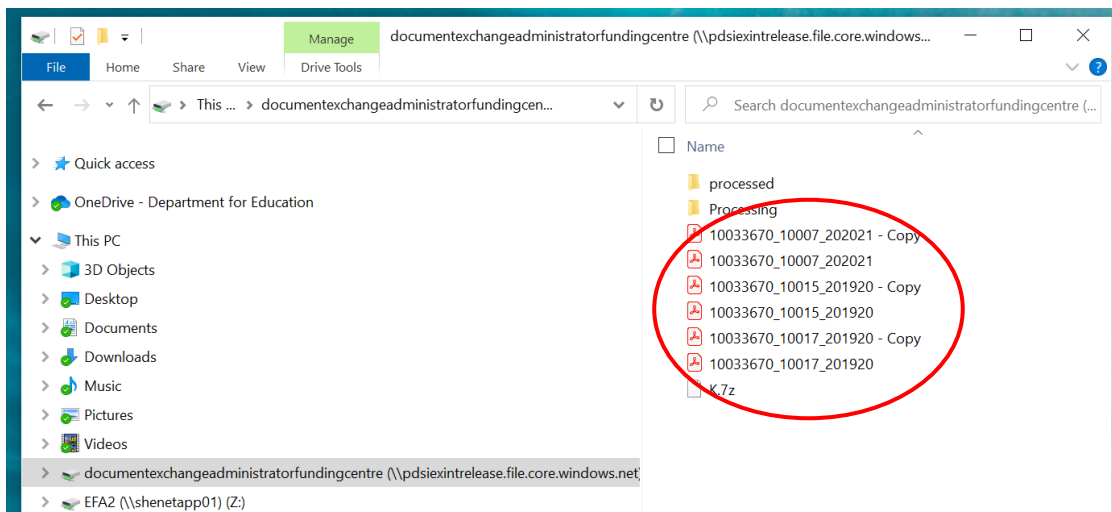
Showing 1 to 10 of 10 documents

Download selected document names and errors (ODS)

Remove selected documents

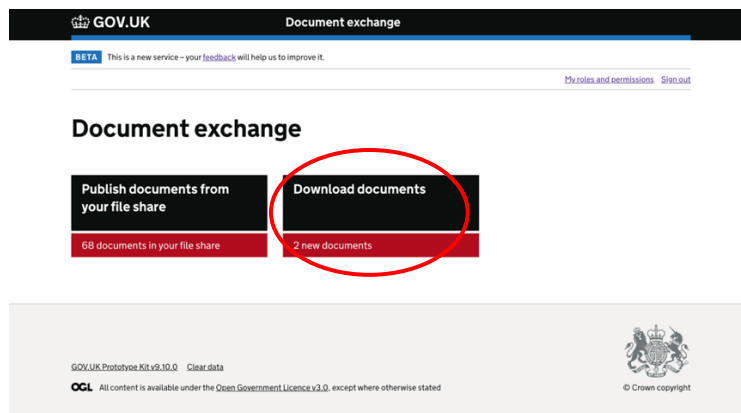
## How to delete Documents:

Documents can only be deleted from the ‘Mapped Drive’.



## How to download Documents:

1. To download documents received from a provider, you need to select 'Download documents':



2. To download all documents, you can select the documents you want to download and then select the button 'download all filtered documents':

