EDM User Guide – Bulk Upload

Bulk upload allows you to submit multiple member records at one time.

Bulk upload files must be in CSV format. CSV templates for all forms are available on the EDM home page.

When you click on a bulk entry form in the home screen you will see the following screen:

CSV Bulk Upload: Annual Return

EDM Data Annual Return CSV

[   ] Browse...
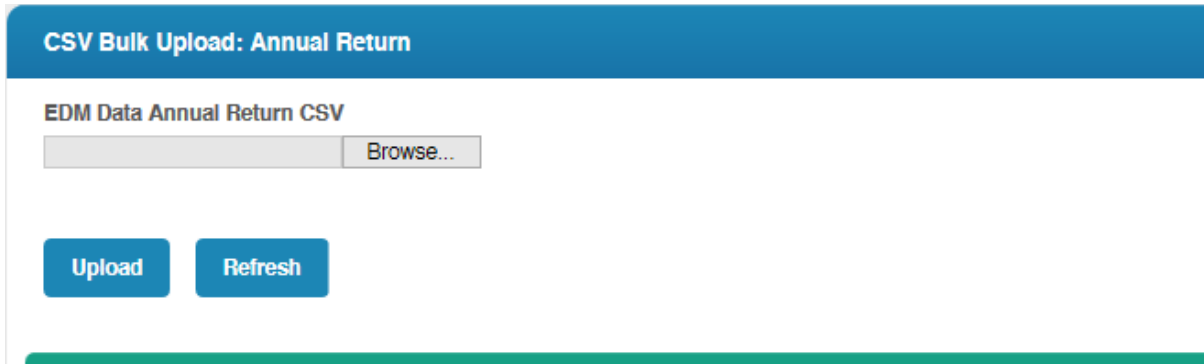
Upload   Refresh

Browse to select the file you want to send and then click 'Upload'.

Upload   Refresh

The file has been uploaded successfully. Press the 'Refresh' button above to see the processing status.

Show Search Criteria

View	Fix	Revalidate	Uploaded On	Uploaded By	Employer	File	Status	Further Info	Completed On
			23/02/2016 09:45:59	kerry.innes@gov.scot		test data for guide 3.csv	⚪	Awaiting Load ...	
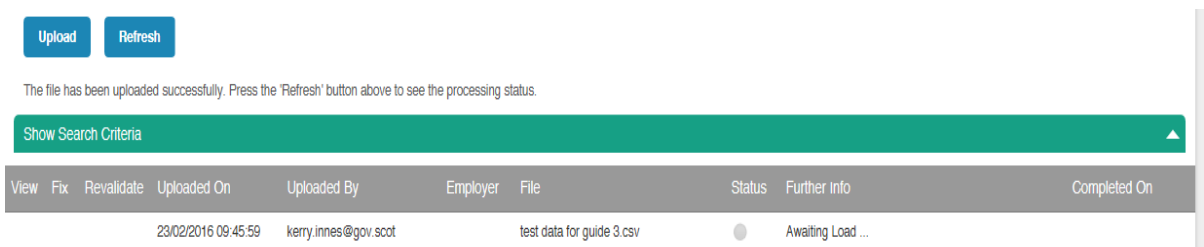
You will be prompted to press the 'Refresh' button. If your upload is successful you will see the following screen:

Upload   Refresh

Show Search Criteria

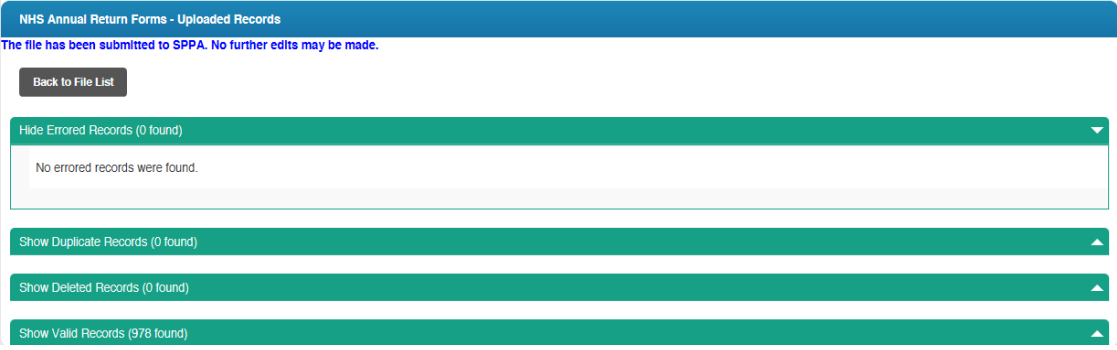| View	Fix	Revalidate	Uploaded On	Uploaded By	Employer	File	Status	Further Info	Completed On
▶			23/02/2016 09:17:35	kerry.innes@gov.scot		test date for guide 1.csv	🟢	SUCCESS. 16 of 16 record(s) valid. Original load had 0 errored record(s). ... more	23/02/2016 09:17:42
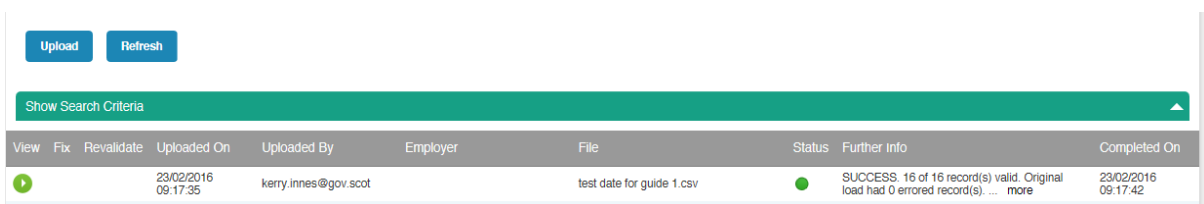
This screen details your file upload with information displaying when the file was uploaded and who uploaded the file along with the file name. The 'Further info' and 'Completed On' columns give the number of successfully uploaded records and the date and time the upload was completed.

Green Dot – Successful Data Upload

The green dot under 'Status' indicates the upload has been successful. The icon under 'View' allows you to view your uploaded data:

This will break down your uploaded file into 'Errored', 'Duplicate', 'Deleted' and 'Valid' Records. If your file is successful on first submission you will not see any errored or deleted records in this view. When your upload status is green you will not be able to make further changes to any of the records.

If there are errors within the bulk upload file the status indicator will show either a red or amber dot.
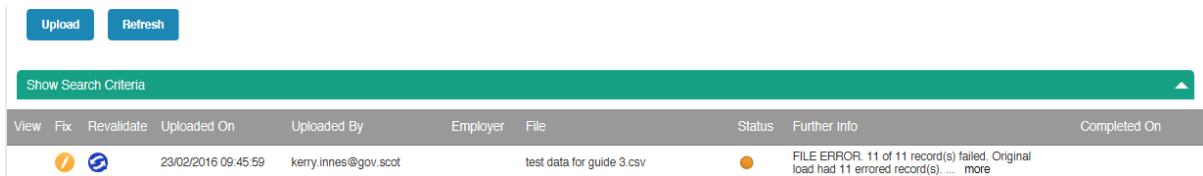
Red Dot – Unsuitable Format

Where the bulk upload contains wholly unsuitable data, the status icon will be a red dot and there will be an exclamation mark within the red icon under 'View' in the list entry. This indicates that the file has not been accepted by the system and is unable to be viewed.

As this error means the upload file has been deemed unacceptable it will need to be checked for fundamental errors (such as loading the wrong form type), amended and then reloaded.
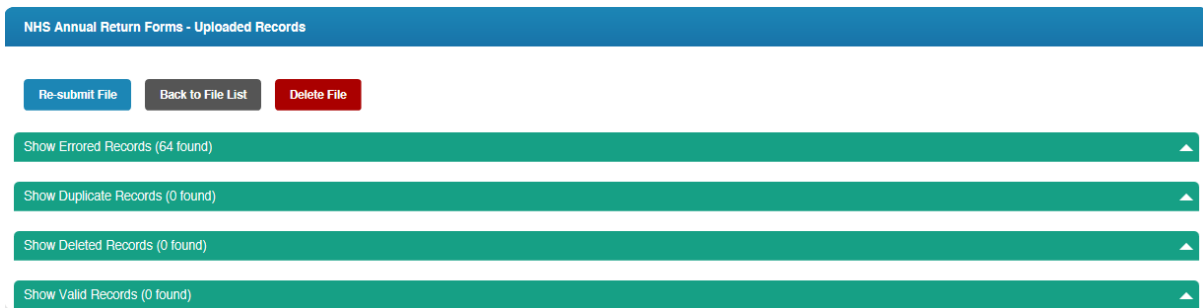
Amber Dot – Acceptable Format with Errors

If the file has a mixture of valid and errored files, the upload entry will display an amber dot. Click the pen icon 🟠 under 'Fix' to proceed to the fix menu.

The fix menu will break down your upload into errored, duplicate, deleted and valid records:

Each menu will expand to show the individual entries in each category.

Errored Records

If you expand the errored records file you will see a list of all the entries that contain errors.

To correct the data, click on the yellow pen 🟠 beside each individual record.

This will take you to the single record screen (this is the same as manual entry)

Errored fields are highlighted in red, and there is an explanation of each error to the right, also in red.

Once you have entered the correct information, click on 'Submit', and you will be taken back to the previous screen. You also have the option to save your progress or delete the record if you no longer wish to submit that individual record with the rest of the data.

When you have corrected a record you will see a green tick icon . A confirmation message also informs you that the record is now fixed.

Once all the individual records have been corrected click the 'Re-submit File' button to re-process the entire file.

Once re-processed the corrected file will display a green dot and your file is accepted to SPPA.

Things to consider with bulk uploads

Be careful when re-opening saved CSV files prior to uploading to EDM as leading zeroes will be lost. EDM has field padding enabled for most fields however the pay reference will be incorrect if leading zeroes are lost.

Large files may take longer to process so it may be useful to upload your file before leaving for the day and then login the next working day to check the status of your file.

If you notice a common error in your uploaded file in the errored records list (e.g. incorrect contributions rates) it may be quicker to delete the EDM file and correct the upload source file before re-uploading to EDM.

If you are having difficulty uploading your files please contact the EDM team using the 'Contact Us' function or telephone on 01896 893000 and ask for 'EDM'. You can also email SPPAEDM-Enquiry@gov.scot.