

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.

Upload Employer Data

Upload Data

Type of Form	Manual Entry	Bulk Upload
Starter		
Leaver		
Annual Return		
Service Change		
Misc Update		
Amendment		

Download CSV Template

 Starter  Leaver  Annual Return  Service Change

 Misc Update  Amendment

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

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:

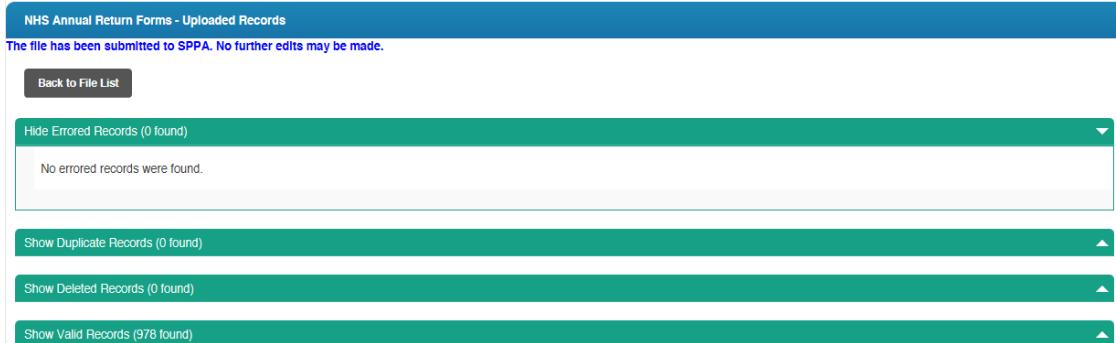
Show Search Criteria

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 data 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:



The screenshot shows a web interface for managing uploaded records. At the top, a blue header bar displays the text 'NHS Annual Return Forms - Uploaded Records' and a message: 'The file has been submitted to SPPA. No further edits may be made.' Below the header is a 'Back to File List' button. The main content area is divided into several sections, each with a green header bar and a dropdown arrow: 'Hide Errorred Records (0 found)', 'No errorred records were found.', 'Show Duplicate Records (0 found)', 'Show Deleted Records (0 found)', and 'Show Valid Records (978 found)'. The 'Show Valid Records' section is expanded, showing a list of 978 valid records.

This will break down your uploaded file into 'Errorred', '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

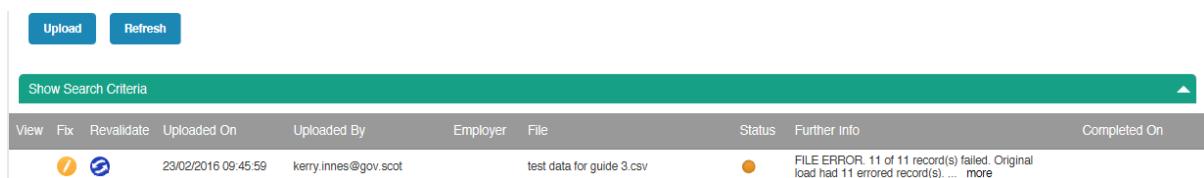
Where the bulk upload contains wholly unsuitable data, the status icon will be a red dot and there will be an exclamation mark  within the red icon under 'View' in the list entry. This indicates that the file has not been accepted by the system and is unable to be viewed.

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.

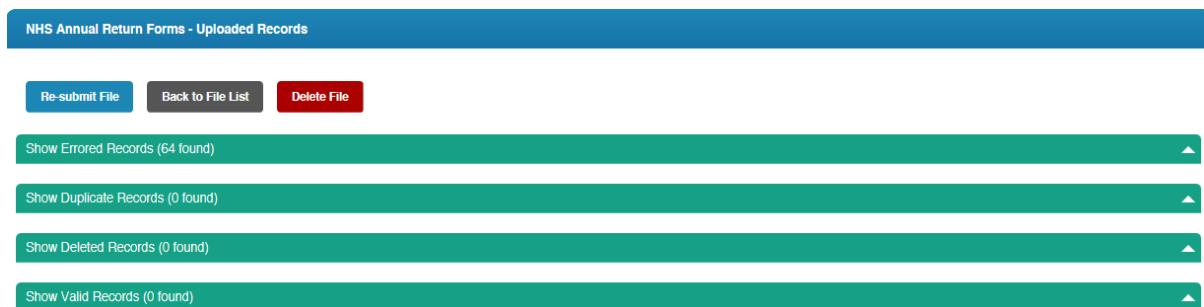
	19/02/2016 10:11:26	Michael.Riddell@gov.scot	STPS 02 5-6.csv	 ERROR: Incorrect form code in file data row. This page is for uploading Starter forms only. Each type of form has a separate upload page, accessible from the links on the 'Home' page. less
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Amber 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.

 02	50505	780072	31400	02061977	MS	F	DIBBLE	S	AB473692C 01		365	348883
 02	50505	781446	133298	22121977	MRS	F	DIBBLE	F	AB736985C 07		0362	1365 107974
 02	50505	781900	30667	02041983	MR	M	DIBBLE	R	AB123456C 01		365	459317

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)

Data Entry Form: Leaver

Employer Code *	Leaving Date *	Member Contributions	
50505	31/03/2015	Employees Pension Contributions	Notes
National Insurance Number *	Reason for Leaving *	3,314.40	<input type="text"/>
AB473692C	32 - Retainer Scheme Arrangement	Employers Pension Contributions	Submit Save for later
Superannuation Number	Employee Contribution Rate (%) *	3,314.40	Delete record Return to record list
780072	<input type="text"/>	Additional Percentage Contributions	
Pay Reference Number *	Service	Additional Pension Contributions	
31400	Type of Service *	Cons on a higher Salary	
Date of Birth *	01 - WHOLE TIME	0.00	
02/06/1977	Full Time Days *	Salary Rate at Date of Leaving *	
Sex *	365	348.87	
Female	Pay	State Scheme Earnings (whole £ only)	
Title	Employees Pensionable Pay	29,458	
MS	34,888.32		
Surname *	Overtime or CARE Pensionable Pay		
DIBBLE	34,888.32		
Forename *	Employers Pensionable Pay		
S	34,888.32		
Middle Name Initials			

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.

STPS Leaver Forms - Uploaded Records

The record is fixed. Please correct any further errored records and click the 'Re-submit File' button to re-attempt submitting the file to SPPA.

Re-submit File		Back to File List		Delete File															
Hide Errored Records (11 found)																			
Fixed	Deleted	Edit	Form Type	Employer Code	Superannuation Number	Pay Reference Number	Date of Birth	Title	Sex	Surname	Forename	Middle Name Initials	National Insurance Number	Type of Service	Employee Contribution Rate	Full Time Days	Part Time Hours (including holiday hours)	Full Time Hours	Emplo Pensi Pay
		02	50505	780072	31400	02061977	MS	F	DIBBLE	S	AB473692C	01	0790	365			034888		

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.

CSV Bulk Upload: Leaver

The file 'test data for guide 3.csv' has been submitted for re-processing.

EDM Data Leaver CSV

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		File awaiting re-validation ...	

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

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		SUCCESS. 11 of 11 record(s) valid. Original load had 11 errored record(s) ... more	23/02/2016 10:31:46

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.